

UTAH AIRPORTS ECONOMIC IMPACT STUDY



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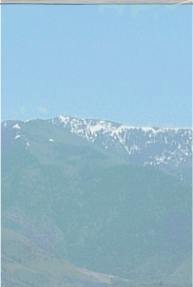
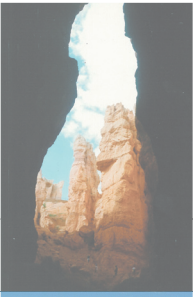
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Introduction

Introduction

The Utah system of public-use airports is an integral component of the state's overall transportation system, and is also an important stimulus for economic growth and development in Utah. The state airport system provides a safe and efficient method for the movement of people and goods, improving the quality of life of Utahns. Utah's system of airports includes six commercial service airports and 41 general aviation airports. The six commercial service airports, including Salt Lake City International, accommodate millions of passengers and generate billions of dollars in economic benefits. The 41 general aviation airports are also significant generators of revenue, jobs, and wages, creating thousands of jobs and producing millions of dollars of economic impact throughout Utah each year. Thousands of visitors arriving in Utah via general aviation aircraft each year support a variety of business activities such as lodging, dining, retail, and entertainment. Utah airports also serve as the base of operation for many types of businesses, including airlines, air cargo companies, fixed base operators, flight schools, government entities, restaurants, and many others. To better understand the relationship between aviation in Utah and the statewide economy, The Utah Department of Transportation (UDOT), Division of Aeronautics, in conjunction with the Utah Air Travel Commission, have undertaken this economic impact analysis.

Many employers that contribute to the strength of the state's economy rely on the Utah system of airports to support their business operations. As the findings of this analysis demonstrate, many people beyond the immediate vicinity of each airport benefit from the daily aviation activity supported by the system, including commercial and industrial employers that use airports as a means of shipping and receiving goods; businesses that base corporate aircraft at system airports; and hotels, restaurants, and other tourist-related establishments whose patrons use the system of airports to visit Utah.

The primary focus of this study is to identify and quantify the economic impacts to the state and local

economies resulting from the daily operation of the Utah airport system. These impacts were determined using a method that has been approved by the Federal Aviation Administration (FAA), and has been applied to airport systems throughout the United States. Surveys, telephone interviews, airport visits, and economic modeling procedures were used to quantify all impacts associated with on-airport tenants, general aviation visitors, and non-aviation businesses that rely on these airports. This process produced estimates of expenditures, payroll, and employment attributable to the Utah airport system. Impacts are assessed for both general aviation and commercial service airports. The detailed estimates for each individual airport appear in the Appendices to this report. An additional

objective of the analysis is to assess those benefits that are not as easily quantified, such as health, safety, education, recreation, and overall community support. Such activities as emergency medical transport, police and fire support, traffic reporting, and search-and-rescue operations benefit Utah residents on a regular basis.

Utah's travelers
can fly to the
world's business
and tourism
centers with no
more than one or
two layovers.

Exhibit 1, *The Utah System of Airports 2003*, displays the location of each airport in the Utah airport system. These airports account for almost 330,000 commercial airline and over one million general aviation takeoffs

and landings, nearly nine million commercial passenger enplanements, and over 1,760 based aircraft. The largest airport in the system, Salt Lake City International, is a passenger and cargo gateway for much of the western United States, including Utah, western Wyoming, southern Idaho, and northeastern Nevada. As a Delta Air Lines hub, Salt Lake City International Airport affords residents and visitors easy access to the world's airline system. In addition to Delta, Salt Lake City is served by low-cost carriers Southwest and JetBlue. Other carriers serving Salt Lake City include AeroMexico, America West, American, Continental, Frontier, Northwest, Salmon Air, SkyWest, and United. These airlines have an extensive route network with 396 daily departures to 70 nonstop destinations. Most of Utah's travelers can fly to the world's business and tourism centers with no more than one or two layovers. In 2002, Salt Lake City International handled over 18.6 million passengers and over 476 million pounds of mail and cargo. This level of passenger traffic makes Salt Lake City International the 25th largest airport in the

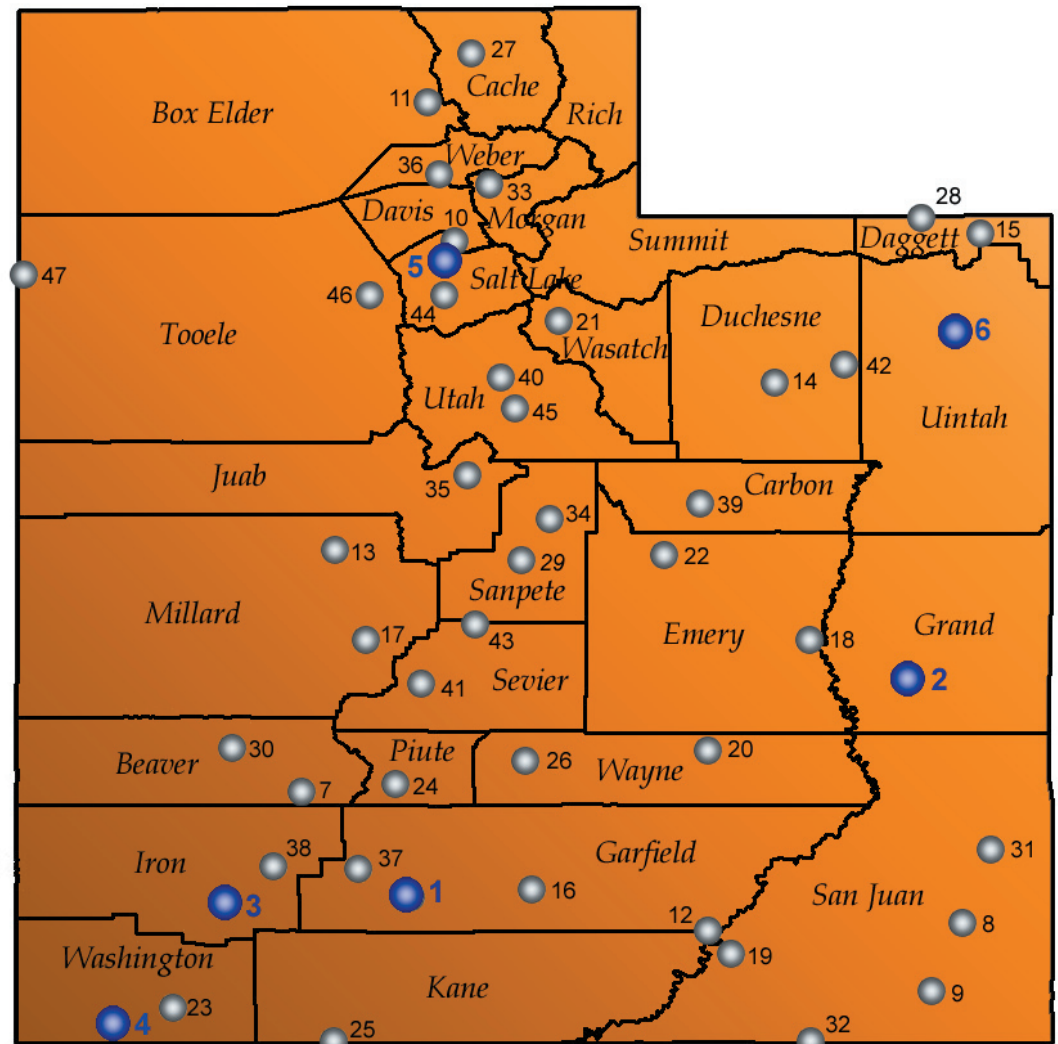
INTRODUCTION

country. With over 400,000 takeoffs and landings in 2002, Salt Lake City International is the 18th busiest airport in the United States.

that the economic relationship between the Utah system of airports and the state's economy will strengthen as the number of visitors, aircraft operations, and based aircraft increase at Utah's airports.

The findings of this study were based on 2003 airport enplanement and operations data and estimates of spending levels for the 2003 calendar year. It is likely

Exhibit 1
The Utah System of Airports
2003



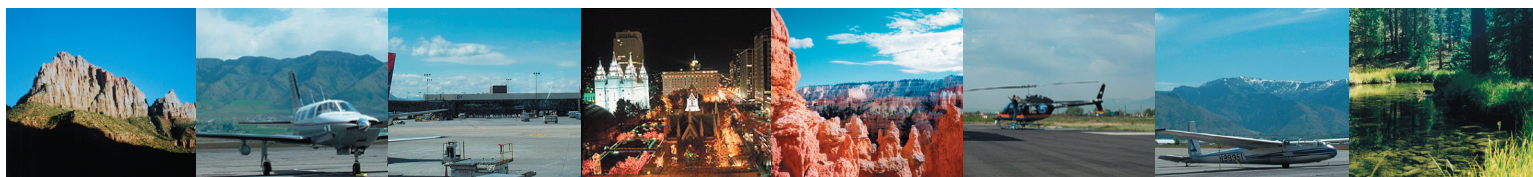
Commercial Service

- 1 Bryce Canyon
- 2 Canyonlands Field
- 3 Cedar City Regional
- 4 Saint George Municipal
- 5 Salt Lake City International
- 6 Vernal-Uintah County

General Aviation

- 7 Beaver Municipal
- 8 Blanding Municipal
- 9 Bluff
- 10 Bountiful Skypark
- 11 Brigham City Municipal
- 12 Bullfrog Basin (Glen Canyon)
- 13 Delta Municipal
- 14 Duchesne Municipal
- 15 Dutch John
- 16 Escalante Municipal
- 17 Fillmore
- 18 Green River Municipal
- 19 Cal Black Memorial (Halls Crossing)
- 20 Hanksville
- 21 Heber City Municipal - Russ McDonald Field
- 22 Huntington Municipal
- 23 Hurricane
- 24 Junction
- 25 Kanab Municipal
- 26 Wayne Wonderland (Loa)
- 27 Logan-Cache
- 28 Manila
- 29 Manti-Ephraim
- 30 Milford Municipal
- 31 Monticello
- 32 Monument Valley
- 33 Morgan County
- 34 Mount Pleasant
- 35 Nephi Municipal
- 36 Ogden-Hinckley
- 37 Panguitch Municipal
- 38 Parowan
- 39 Price -Carbon County
- 40 Provo Municipal
- 41 Richfield Municipal
- 42 Roosevelt Municipal
- 43 Salina-Gunnison
- 44 Salt Lake City Municipal II
- 45 Spanish Fork- Springville
- 46 Bolinder Field - Tooele Valley
- 47 Wendover





Economics, Demographics and Tourism

Economics, Demographics and Tourism

The magnitude of the economic impact of Utah's airports is linked to the demand that is generated within the state for aviation services. While some amount of air traffic will be tied to the state's tourism activities, much of the growth in aviation activity in Utah is driven by its residents and businesses. As population, employment and income levels rise in the state, so too does demand for airline travel, air cargo shipments, recreational flying, and other aviation-related activities. This section will inventory Utah's general economic characteristics. (All dollar figures quoted are inflation-adjusted.)

Population. According to the U.S. Census Bureau, the total population of Utah in 1990 consisted of 1,722,850 persons. By the year 2000, the population had grown to 2,233,169, representing an average annual growth rate of approximately 2.9 percent (or an increase of approximately 51,000 people each year), making Utah the 34th most populated state in the nation. During the same period, the U.S. population grew at about 1.6 percent per year.

The Salt Lake City Consolidated Metropolitan Statistical Area (CMSA), which includes Salt Lake City and Ogden, had a population of about 1,333,914 in 2000. The Provo-Orem CMSA had a 2000 population of 368,536. These two CMSAs combined accounted for about 76 percent of Utah's population in 2000. Brigham City, Cedar City, Logan, and St. George together accounted for 130,271 persons in 2000, or about six percent of the state's total.

Household Characteristics. As of the 2000 Census, there were 768,594 households in Utah, up from 537,273 in 1990. This equates to about 2.91 persons per household in 2000, the highest in the nation, but down from the 1990 figure of 3.21. The average number of persons per household across the U.S. in 2000 was approximately 2.43. The Salt Lake City-Ogden CMSA

accounted for about 432,040 households in 2000, for an average of about 3.09 persons per household. The Provo-Orem CMSA had about 99,937 households, and averaged 3.68 persons per household.

Gross State Product and Industry Mix. Utah's Gross State Product (the state equivalent of Gross Domestic Product, or GDP) in 2001 was more than \$63.57 billion, ranking 32nd in the United States. This was an increase of 7.5 percent annually from \$36.30 billion in 1990. The nation's Gross Domestic Product, by comparison, grew 4.1 percent annually in the 1990s.

Historically, the dominant sectors of Utah's economy have been Durable Goods Manufacturing (specifically, industrial equipment and primary metals), Mining, and Retail Trade. In recent years, however, a number of other industries have begun to dominate Utah's economy. Motor vehicle equipment manufacturing, instrument and related item manufacturing, chemical production, air transportation and other transportation services, business services, and the Finance, Insurance, and Real Estate sector have all seen double-digit annual growth rates in the last 20 years. This reflects similar trends at the national level, with most of the nation moving from a production-based economy to one that is more service- and technology-driven.

Employment. In 2000, the civilian non-farm workforce in Utah totaled just over 1.37 million workers. About 423,000 of these workers, or nearly 31 percent of the workforce, were employed in service industries, with business service employees as the largest subgroup. Another 235,000 workers, or 17 percent of the workforce, were employed in retail trade occupations, eating and drinking establishment employees chief among them. **Table 1, Utah Non-Farm Employment by Industry,** categorizes occupation and employment in Utah for the year 2000.

As population, employment and income levels rise in the state, so too does demand for airline travel, air cargo shipments, recreational flying, and other aviation-related activities.

ECONOMICS, DEMOGRAPHICS AND TOURISM

Table 1
Utah Non-Farm Employment by Industry, 2000

SECTOR	2000 EMPLOYMENT	SECTOR	2000 EMPLOYMENT
Nonfarm employment	1,370,180	Local and interurban passenger transit	2,238
Private employment	1,167,300	Transportation by air	14,744
Ag. services, forestry, fishing and other ¹	12,074	Pipelines, except natural gas	(D)
Agricultural services	11,405	Transportation services	4,204
Forestry, fishing, and other ¹	669	Communications	12,329
Forestry	(D)	Electric, gas, and sanitary services	7,225
Fishing	(D)	Wholesale trade	57,225
Other ¹	-	Retail trade	235,083
Mining	9,274	Building materials and garden equipment	9,682
Metal mining	2,573	General merchandise stores	25,789
Coal mining	1,812	Food stores	33,548
Oil and gas extraction	3,353	Automotive dealers and service stations	25,354
Nonmetallic minerals, except fuels	1,536	Apparel and accessory stores	9,507
Construction	94,807	Home furniture and furnishings stores	12,506
General building contractors	22,031	Eating and drinking places	69,165
Heavy construction contractors	8,730	Miscellaneous retail	49,532
Special trade contractors	64,046	Finance, insurance, and real estate	132,144
Manufacturing	136,689	Depository and non-depository institutions	30,078
Durable goods	91,704	Other finance, insurance, and real estate	102,066
Lumber and wood products	5,680	Security and commodity brokers	5,234
Furniture and fixtures	5,620	Insurance carriers	8,220
Stone, clay, and glass products	5,534	Insurance agents, brokers, and services	11,218
Primary metal industries	5,944	Real estate	45,666
Fabricated metal products	10,897	Holding and other investment offices	31,728
Industrial machinery and equipment	11,509	Services	422,293
Electronic and other electric equipment	8,847	Hotels and other lodging places	20,313
Motor vehicles and equipment	7,767	Personal services	25,244
Other transportation equipment	8,072	Private households	4,863
Instruments and related products	10,272	Business services	109,673
Miscellaneous manufacturing industries	11,562	Auto repair, services, and parking	15,623
Nondurable goods	44,985	Miscellaneous repair services	6,569
Food and kindred products	12,660	Amusement and recreation services	27,021
Tobacco products	-	Motion pictures	7,837
Textile mill products	446	Health services	74,716
Apparel and other textile products	3,138	Legal services	8,313
Paper and allied products	2,749	Educational services	32,335
Printing and publishing	12,538	Social services	17,093
Chemicals and allied products	8,292	Museums, botanical, zoological gardens	771
Petroleum and coal products	1,090	Membership organizations	23,061
Rubber and misc. plastics products	3,833	Engineering and management services	39,903
Leather and leather products	239	Government and government enterprises	202,880
Transportation and public utilities	67,711	Federal, civilian	32,397
Railroad transportation	1,804	Military	16,255
Trucking and warehousing	24,980	State and local	154,228
Water transportation	(D)	State government	61,699
Other transportation	(D)	Local government	92,529

(D): Not shown to avoid disclosure of confidential information, but the estimates for this item are included in the total.

1: "Other" consists of the number of jobs held by U.S. residents employed by international organizations and foreign embassies and consulates in the United States.

UTAH AIRPORTS ECONOMIC IMPACT STUDY

Per Capita Personal Income. Per capita personal income for the State of Utah was approximately \$19,765 in 1990, and grew to \$23,517 by 2000. The change in this figure represents a 19 percent annual growth rate. By comparison, per capita personal income for the nation as a whole grew from \$25,788 to \$29,844 in the same period, for a 16 percent increase. While Utah's average standard of living lags behind the rest of the country, it is increasing at a faster rate.

Summary. From the statistics reported above, it is clear that Utah's economy is in a period of substantial growth. Between 1990 and 2000, the state's population grew faster than the U.S. average, its Gross State Product nearly doubled the U.S. Gross Domestic Product growth rate, as new high-tech industries and jobs took the place of older industries, and the average standard of living increased at a rate faster than the rest of the country. Growth measures such as these indicate increased demand for aviation activities and aviation-related businesses in the state.

Tourism and Visitor Industry Information

Tourism in Utah is an important industry to the state's economy. With five national parks, numerous ski resorts, a large metropolitan city at the crossroads of two major interstates, the headquarters of the Church of Jesus Christ of Latter-day Saints, and countless other attractions across the state, Utah is a destination for millions of travelers from around the world. The 2002 Winter Olympics in Salt Lake City only increased worldwide awareness of the state's attractions.

In 2002, tourism to Utah was recovering from the effects of the September 11, 2001 terrorist attacks. As a result, indicators of state tourism volume were mixed at year-end. National Park visits were up 5.2 percent from 2001, Welcome Center traffic was up 2.5 percent, and hotel/motel occupancy rates had increased 2.2 percent from the previous year. Conversely, visits to National Monuments and Utah state parks were down 10.2 and 5.3 percent respectively, and passenger traffic at Salt Lake City International had decreased by approximately one-third of one percent from its 2001 level.

Tourism to Utah is important for a variety of reasons, not the least of which is the amount of spending tourists

characteristically make while in the state. The Utah Division of Travel Development published profiles of different visitor types in 2002. These profiles, derived from survey data, show a number of characteristics of the average traveler that indicate a high level of visitor spending in Utah. The average overnight leisure visitor to Utah stays approximately 3.1 days, travels with 3.4 persons in his party, and spends an average of \$75 per person per day. He is 41.7 years old, attended at least some college, earns a household income of \$57,600, and has children. On the other hand, non-resident visitors earn slightly higher incomes, averaging \$58,200. Also, non-resident visitors stay approximately 3.2 days, travel in a party of 2.8 persons, and spend \$101 per person per day. Over 70 percent of Utah visitors arrive by car, and the average visitor has traveled in excess of 550 miles to reach his Utah destination.

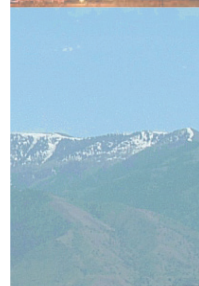
Most non-resident visitors arrive from the western U.S., with 53 percent of survey respondents originating their trips in Nevada, California, or Idaho. Approximately 18 percent of non-resident visitors to Utah come from the Las Vegas metropolitan area, and another nine percent are from Los Angeles.

Europe is Salt Lake City's largest international market, accounting for nearly 33 percent of all international visitors to the city. Latin American visitors comprise 26 percent of international visitors, with Canadians third at 25 percent.

Travelers from Asia comprise approximately 14 percent of all international visitors to the Salt Lake City area.

About 50 percent of spending by travelers to Utah falls into the "general spending" category, comprised of shopping, dining, and entertainment. Other significant sources of spending include sightseeing and outdoor sports, followed closely by spending on nature activities such as visits to National Parks and camping.

Utah's economy is in a period of substantial growth: between 1990 and 2000, the state's population grew faster than the U.S. average, and its Gross State Product nearly doubled the U.S. Gross Domestic Product growth rate.





Methodology

Methodology

The total economic impact, or contribution, of each airport in the Utah system is quantified in this analysis in terms of employment, payroll, and output. The economic impacts generated by on-airport tenants and visitors traveling to Utah account for a significant percentage of the economic benefits associated with the state airport system. Tenant employment, capital investment, and gross sales affect several economic factors, and itinerant aircraft further stimulate the economy with spending on various goods and services by visiting passengers. These elements were measured as a part of this study.

As an additional element of this study, approximately 3,000 businesses located throughout Utah were surveyed to determine the importance of aviation to non-aviation businesses. The business-related impacts identified during the survey process are presented in a subsequent section of this report, "The Business Use of Utah's Airports."

The Economic Model

The economic benefits produced by the Utah airport system were determined using two basic data elements: (1) actual survey data; and (2) data from an input-output model that estimates purchases and sales between the various sectors of the economy. The model incorporated multipliers and data tables specific to Utah and required direct impact estimates for three separate, though interrelated, components of the economy:

- *Employment* – Employment is based on *full-time equivalent (FTE)* positions. For example, two part-time employees were assumed to equal one full-time employee.
- *Payroll* – Payroll is the annual salary and benefits paid to employees.
- *Output (Spending)* – Output for on-airport tenants is commonly assumed to be the sum of average annual capital expenditures and annual gross sales. Since government tenants typically do not generate sales, this assumption must be modified: to estimate the economic impact of government entities, output is derived from the sum of average annual capital expenditures, operating expenses, and payroll.

It should be noted that each of the three economic components described above are considered independently and should not be added. While it may be tempting to add payroll and output into one grand dollar total of economic impact, each component is calculated differently and stands as an independent measure of each airport's contribution. In addition, some elements of payroll are included in the output estimates, and vice versa.

Economic impacts are expressed for three impact levels to assess the benefits associated with on-airport tenants and general aviation visitors. The three levels that were included are:

- *First-Round Impacts* – First-round impacts include both direct and indirect impacts.

Direct impacts are the benefits associated with businesses located at the airport that are directly related to the provision of aviation services. Direct impacts include the employment, payroll, and spending of businesses such as airlines, concessionaires, fixed base operators (FBOs), flight schools, government entities, and others.

Indirect impacts occur as a result of aviation, but generally take place off-airport. These impacts are attributed to the expenditures of visitors who arrive in Utah by air via commercial airlines or general aviation. Visitor expenditures support employment and payroll in service-related industries such as lodging, food and beverage, retail, and entertainment. Visitor spending for aviation-related goods and services is not accounted for in the visitor expenses; instead, it is included in the appropriate tenant's gross sales.

For this study, all first-round impacts were identified through survey efforts as well as interviews with various airport managers throughout the Utah system.

- *Secondary Impacts* – Secondary impacts consist primarily of induced impacts. Induced impacts are the benefits resulting from the recirculation of direct and indirect impacts within the economy. This recirculation is typically referred to as the multiplier effect. For example, as an airport employee spends his or her salary for housing, food, and services, those expenditures circulate through the economy, resulting in increased

spending, payroll, and employment throughout Utah.

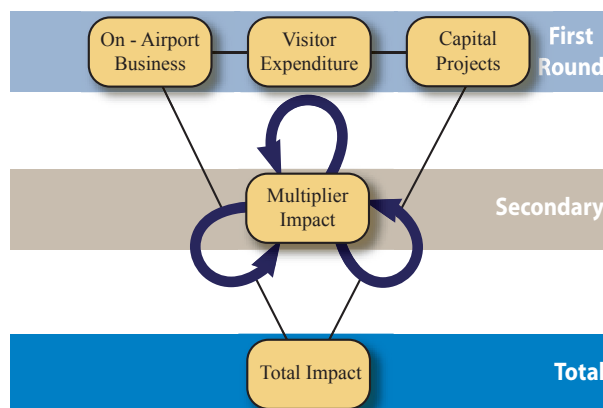
Because secondary impacts are not as easily quantified as first-round impacts, a reliable method of estimating the induced impacts must be applied. For this study, the Impact Analysis for Planning (IMPLAN) model was used to measure the multiplier effect and determine secondary impacts. This model is considered a standard method for evaluating the economic benefits of public facilities, and has been used nationwide to approximate the economic impacts associated with airports and airport systems. The model contains a detailed database of economic multipliers used to estimate the induced impacts associated with the first-round on-airport and visitor spending.

For each round of spending beyond the first round, a share of the re-spending occurs outside of the area. This is considered economic leakage, and therefore is not included in the statewide multiplier.

- **Total Impacts** – Total impacts are the sum of all first-round and secondary economic activities associated with an airport or an airport system.

A graphic representation of the relationship between first-round and secondary impacts is displayed as **Exhibit 2**.

Exhibit 2
The Multiplier Effect



Required Data for the Modeling Process

A number of extensive data collection efforts were employed to obtain information pertaining to the economic activities occurring at Utah's airports. This data constituted the inputs to the economic model used to calculate the total economic impact of the Utah system of airports. First-round impact data was collected throughout the system by surveying and/or interviewing the following groups of people:

- **On-Airport Tenants** – This group consists of aviation-related businesses such as airlines, cargo operations, concessionaires, FBOs, flight schools, government entities, and others. Government entities include public airport sponsors, UDOT, FAA, TSA, and various other public agencies.
- **Commercial Service Visitors** – Five of Utah's six commercial service airports have scheduled commercial airline service (Bryce Canyon Airport accommodates a significant amount of on-demand chartered sightseeing flights). Non-local passengers that arrive by airlines generate economic impacts across the state, whether attending a conference in Salt Lake City or backpacking in Zion National Park. For this study, commercial service visitors were assumed to be a portion of each airport's total enplaned passengers (less connecting passengers). The first-round impacts of this group were identified through survey efforts conducted at Salt Lake City International. This information was compared to data compiled by the Utah Division of Travel Development.
- **General Aviation Visitors** – Impacts associated with general aviation are generated by non-local passengers arriving via private or corporate aircraft. For this study, general aviation visitors were assumed to constitute a portion of each airport's itinerant general aviation activity that is truly transient (or visiting) in nature. The first-round impacts of this group were identified through survey efforts conducted in cooperation with managers and/or FBOs at various Utah airports, and by using industry averages.

To obtain an estimate of the subsequent secondary impacts, IMPLAN multipliers were applied to the first-round impacts that were established during the data collection process. The use of primary-source survey data to approximate all first-round impacts ensures a high level of confidence in the final results.

Airport Categories

The economic benefits presented in this study have been categorized to distinguish between the impacts



associated with the different types of airports included in the Utah system, and the types of activity that each accommodates. The focus of this analysis is the economic impact of Utah's 47 public-use airports. The Federal Aviation Administration has identified four airport classifications: Primary Commercial Service, Small Commercial Service, Reliever, and General Aviation. For this study, the Primary Commercial Service Airports (Cedar City Regional, Salt Lake City International, and St. George Municipal) and the Small Commercial Service Airports (Bryce Canyon, Moab-Canyonlands Field, and Vernal-Uintah County) have been combined into one Commercial Service Airport Classification. Also, the Reliever Airports (Ogden-Hinckley, Salt Lake Municipal II, and Tooele Valley - Bolinder Field) have been combined with the General Aviation Airports into one General Aviation classification. For Commercial Service airports, impacts were measured for both commercial service and general aviation airport uses. Also, due to the magnitude of impacts and activities at Salt Lake City International, impacts at the state's less active commercial service airports at Bryce Canyon, Cedar City, Moab, St. George, and Vernal are discussed separately from those at Salt Lake.

Data Collection

The first-round impacts for each type of airport user, including tenants, visitors, and non-aviation businesses, were established through an extensive survey process. This is a critical component for the development of the final economic impact estimates, since estimates of secondary impacts are driven by estimates of first-round impacts. The following sections describe the methods that were used to collect information from each type of airport user. For each of the surveys, respondents were asked to provide actual 2002 operating data, and to estimate 2003 financial figures. These figures were used to estimate 2003 impacts. Other data, including passenger and aviation activity used to estimate visitor impacts, were derived from the most recent data provided by the airports or the FAA, which were generally year-end 2002.

a. Airport Tenants

Airport sponsors and owners were contacted to provide information for each airport tenant. All airport tenants that had employees located at Utah system airports were contacted in an effort to collect data pertaining to their economic activity. Surveys were distributed, and follow-up telephone calls were made, to encourage responses and to verify information on returned surveys. To facilitate data estimation, the tenants at each airport were categorized as follows:

- Agriculture
- Air Cargo
- Aircraft Maintenance

- Airline
- Auto Rental
- Concession
- Corporate Operations
- FBO
- Flight Instruction
- Flight Service
- Government (Federal/State)
- Local Government
- Military
- Non-Aviation
- Other Aviation

The survey requested the following information:

- The type of aviation activity conducted by the business tenant.
- The number of full-time and part-time personnel employed by the business tenant at the airport.
- The total annual wages and benefits paid to the on-airport employees.
- The total amount the business tenant spent for capital improvements at the airport.
- The total operating expenses (excluding the previously identified payroll, taxes, and capital improvements).
- The business tenant's total gross sales at the airport.
- The estimated impact on annual sales activity of the September 11, 2001 terrorist attacks.

A survey response rate of 100 percent was desired; however, some tenants were not willing to participate, or participated only partially. Several follow-up telephone calls and select site visits to non-respondent airports were initiated in order to obtain a higher response rate for on-airport tenant employment. Additionally, the tenant employment data for each airport was mailed to each airport sponsor for confirmation, and the employment estimates were approved by UDOT prior to the continuation of the analysis. For those tenants that did not supply comprehensive information for payroll and output, estimates were developed using ratios of payroll per employee and output per employee. The estimated figures were developed from the data of those Utah airport tenants that did respond to the survey, regional and national averages, and estimated data from previous economic studies.

Following the data estimation process, the tenants were grouped according to a representative IMPLAN industry code based on the goods or services that they provide. For example, aircraft maintenance facilities, flight schools, and FBOs were combined in the air transportation IMPLAN code category. Classifying the tenants in this manner assists with estimating secondary impacts during subsequent modeling procedures.



b. Commercial Service Visitors

In 2002, nearly nine million passengers (including connecting traffic) boarded a plane at one of Utah's six commercial service airports. Of these enplanements, Salt Lake City International accounted for nearly 99 percent. The economic activity attributable to visitors to Utah arriving by airlines was derived by surveying passengers at Salt Lake City International Airport, as well as through the use of state and national data on visitor spending activity. Surveys were administered by Wilbur Smith Associates staff as passengers emerged from security checkpoints upon entering the terminal. The survey administration process took place over several weeks during the summer of 2003. The passenger survey requested the following information:

- The airline the passenger was traveling on.
- Whether the passenger was a resident, or visitor to the Salt Lake City region.
- The purpose of the trip (business, personal, military, or other).
- The traveler's final destination.
- The total number in the respondent's party.
- The length of stay.
- The traveler's spending on lodging, food & beverage, ground transportation, entertainment, retail, and other expenditures.
- The number of persons those expenditures accounted for.

In 2002, nearly
nine million
passengers
boarded a plane
at one of Utah's
six commercial
service airports.

From these surveys, an expenditure-per-person-per-day average was developed. Further, an estimate of the resident/visitor ratio of Utah's commercial service passengers was calculated. By multiplying the average expenditure per person per day by the number of visitors arriving by commercial service, an estimate of total visitor spending was derived.

The results of this passenger survey indicate that the average air passenger visiting Utah stays approximately 4.2 days, and spends approximately \$120 per day. Furthermore, the Salt Lake City passenger survey showed that approximately 60 percent of all travelers at Utah's airports were visitors to the state. A study produced by the Utah Division of Travel Development in 2001 confirms these estimates. That study showed that non-resident visitors to the state, including those arriving by car, spend an average of \$101 per day and stay an average of 3.2 days. Ski visitors typically spend about \$273 per day and spend about 4.3 days, according to a skier survey sponsored by the Utah Division of Travel Development and various convention and visitors bureaus.

The following is an example of how overall commercial service impacts were calculated:

- The number of commercial service passengers using Utah Airports in 2002 was obtained from airport management estimates, airline records, FAA Airport Master Record (Form 5010-1), and other sources. For example, if an airport had 20,000 commercial service enplanements in 2002, approximately 60 percent of these were visitors to the state, or:

20,000 commercial enplanements x 60 percent = 12,000 commercial service visitors.

- The findings from the passenger survey regarding average trip length and average number of aircraft occupants were then applied to the estimates of commercial service visitors to determine the total visitor days at each airport. At Utah's commercial service airports (4.2 days per passenger), the 12,000 visitors yield 50,400 total visitor days, or:

12,000 CS visitors x 4.2 days per visitor = 50,400 total visitor days.

- In order to calculate the impact that these visitors have on the economy, it was necessary to estimate the average daily expenditures of each visitor. The value of the typical visitor expenditure (\$120 per day at Utah's commercial service airports) was then applied to the estimated number of visitor days to produce direct commercial service visitor expenditures (output), or:

50,400 days x \$120 = \$6,048,000 of direct CS visitor output at the example airport.

- To determine direct payroll and employment impacts, multiplier ratios based on \$1 million of output were used for each industry category. In other words, ratios developed by the input-output model indicate that for every \$1 million of direct commercial service visitor output, approximately 35.5 full-time positions in other industries are created. Most of these jobs are included in the service and retail sectors. Visitors using commercial service at this example airport would then support approximately 215 full-time positions, or:

\$6,048,000 direct visitor output/\$1,000,000 x 35.5 full-time jobs = 215 full-time jobs.

- The average statewide salary for service/retail



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industries in Utah (\$20,600) was then applied to the estimate of employment to calculate the direct payroll impacts associated with commercial service visitors. In this example, visitor-related direct payroll created by the 215 full-time positions is estimated to total approximately \$4.43 million, or:

$$215 \text{ full-time jobs} \times \$20,600 \text{ average payroll} = \$4,429,000 \text{ total CS visitor payroll.}$$

It is important to note that many of the estimates in this report reflect statewide averages. As a result, estimates for some rural communities may be high, while estimates for some larger communities and resorts may be low. **Table 2, Commercial Service Visitor and Expenditure Summary**, summarizes commercial passenger traffic and expenditures for Utah's six commercial airports in 2003.

c. General Aviation Visitors

The economic activity produced by general aviation visitors in Utah was established by surveying transient pilots and passengers. Surveys were delivered to airport sponsors and FBO managers throughout the state system of airports. These surveys were then distributed to the pilots of arriving transient aircraft. The survey requested the following information:

- The airport where the survey was received.
- The number of travelers in the aircraft.
- The type of aircraft.
- The purpose of the trip.
- The length of stay in the airport area.
- The estimated expenditures during the trip.
- Where the aircraft is based.
- The approximate number of annual trips in general aviation aircraft made by the pilot for business, pleasure, and training purposes.
- Further comments regarding the value of the Utah aviation system to the pilot and his or her business.

determined for each airport in the Utah system based on itinerant operations. Itinerant operations are defined as non-training flights that enter or leave an airport's airspace, whereas "true transient" flights are assumed to have departed from an airport at least 150 miles away from the destination airport. Approximately one-third of all itinerant operations are considered to be true transient flights.

According to the results of the survey, a true transient aircraft visiting one of Utah's general aviation airports was estimated to have an average of 2.9 passengers on board, who stayed approximately 2.1 days, with each passenger spending approximately \$66 per day on goods and services (not related to aviation).

The following is an example of how overall general aviation impacts were calculated:

- The number of itinerant general aviation arrivals was estimated using data obtained from airport management estimates, air traffic control tower counts, FAA Airport Master Record (Form 5010-1), the Utah Division of Aeronautics, and other sources. For example, if an airport has 60,000 annual itinerant operations (which includes arrivals and departures), it has 30,000 annual itinerant arrivals. The Aircraft Owners and Pilots Association (AOPA) estimates that one-third of itinerant arrivals at general aviation airports are typically true transients. One-third of the example airport's 30,000 itinerant arrivals equals 10,000 true transient arrivals, or:

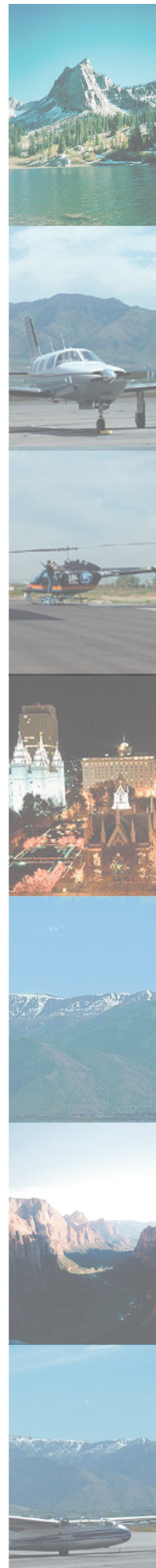
$$30,000 \text{ itinerant arrivals} \times 1/3 = 10,000 \text{ true transient arrivals.}$$

- The findings from the transient pilot survey regarding average trip length and average number of aircraft occupants were then applied to the estimates of true transient arrivals to determine the

Estimates of transient aircraft operations were

Table 2
Commercial Service Visitor and Expenditure Summary
2003

ASSOCIATED CITY	AIRPORT NAME	2002 TOTAL PASSENGER ENPLANEMENTS	TOTAL ANNUAL COMMERCIAL SERVICE VISITOR EXPENDITURES
Bryce Canyon	Bryce Canyon	2,251	\$112,550
Cedar City	Cedar City Regional	9,163	\$2,772,000
Moab	Canyonlands Field	1,460	\$453,600
St. George	Saint George Municipal	41,074	\$12,398,400
Salt Lake City	Salt Lake City International	5,040,468	\$1,524,247,200
Vernal	Vernal-Uintah County	2,119	\$655,200
Utah Commercial Service Total		5,096,535	\$1,540,638,950



total general aviation visitor days at each airport. At Utah's general aviation airports (2.9 passengers staying 2.1 days), the 10,000 true transient arrivals yield 60,900 total visitor days, or:

10,000 arrivals x 2.1 days x 2.9 passengers = 60,900 total visitor days.

- In order to calculate the impact that these visitors have on the economy, it was necessary to estimate the average daily expenditures of each visitor. The value of the typical visitor expenditure (\$66 at Utah's general aviation airports) was then applied to the estimated number of visitor days to produce direct general aviation visitor expenditures (output), or:

60,900 days x \$66 = \$4,019,400 of direct visitor output at the example airport.

- To determine direct payroll and employment impacts, multiplier ratios based on \$1 million of output were used for each industry category. In other words, ratios developed by the input-output model indicate that for every \$1 million of direct general aviation visitor output, approximately 35.5 full-time positions in other industries are created. Most of these jobs are included in the service and retail sectors. Visitors using general aviation at this example airport would then support approximately 143 full-time positions, or:

\$4,019,400 direct visitor output/\$1,000,000 x 35.5 full-time jobs = 143 full-time jobs.

- The average statewide salary for service/retail industries in Utah (\$20,600) was then applied to the estimate of employment to calculate the direct payroll impacts associated with general aviation visitors. In this example, visitor-related direct payroll created by the 142 full-time positions is estimated to total approximately \$2.93 million, or:

142 full-time jobs x \$20,600 average payroll = \$2,925,200 total GA visitor payroll.

Tables 3, Aircraft Operations, Percent Itinerant, and Transient Arrivals and **Table 4, Transient Arrivals, GA Visitors, Visitor-days, and Expenditures** summarize the estimated 2003 general aviation operations and visitor expenditures for the Utah airport system. The operational and visitor impact data for each system airport is included in **Appendix Table A-1, General Aviation Activity**, and **Appendix Table A-2, General Aviation Activity and Visitor Spending**.

d. Non-Aviation Businesses

The economic impacts associated with aviation in Utah extend beyond airport business tenants and visitors. Many Utah businesses, and their employees, depend on the transportation efficiency provided by aviation for the movement of people and goods. Consequently, there are additional employment benefits from "value-added" impacts associated with air transportation. A separate survey was developed for collecting data from non-aviation businesses throughout Utah in order to identify value-added benefits.

The survey requested the following information:

- The location of the company.
- The major product or service provided by the company.
- The estimated number of commercial airline trips by company employees.
- The use of commercial airline service by the company's clients/vendors to visit their business.
- The general aviation airports used by the company for business purposes.
- The impact of the September 11, 2001 terrorist attacks on the company's general aviation activity.
- The company's use of air cargo/package express services for transmitting business materials.
- The company's total employment in Utah.
- The company's annual payroll and gross sales in Utah.
- The percentage of the company's business activity dependent on general aviation.
- The percentage of the company's business activity dependent on commercial airline service.
- The importance of various factors to the location of the business.

The target sample population for this survey consisted of manufacturing and service companies that were considered to be likely users of aviation. The results of this survey effort are presented in a subsequent section of this report.

Impact Multipliers

As discussed, the first-round impacts associated with the Utah system of airports were identified through an extensive survey process. As these first-round impacts are introduced into the economy, they circulate among other sectors of the economy, thereby generating additional spending and re-spending. This is commonly referred to as the multiplier effect. For this study, the multiplier effect is referred to as secondary impacts.

Secondary impacts occur as a result of various interdependencies within an economic system. For example, the operation of an airport requires input in the



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form of equipment, supplies, and maintenance. This input results in increased sales and production for those businesses providing these products, which results in increased jobs and payroll. Furthermore, input is also required for the production of these secondary goods and services, and so on. The total requirement for goods and services is a multiple of the direct needs of Utah airports, hence the term "multiplier".

The multipliers for all secondary impacts were derived from the IMPLAN model. The multipliers used in this analysis were developed specifically to measure economic impacts in the State of Utah. **Table 5, Total Weighted-Average Impact Multipliers**, presents a summary of the multipliers used in this study.

The multipliers in Table 5 were used to estimate secondary impacts in this analysis. For example, \$100 in direct output in the aviation-related tenant sector creates secondary output impacts equivalent to \$67.70 (\$100 multiplied by 1.677 equals \$67.70 in additional impacts). Similarly, 100 government tenant employees results in a secondary impact of 84.4 full-time equivalent employees in all sectors of the economy.

Although survey data was used to estimate the direct output of on-airport tenants, it is not possible to determine actual payroll and employment figures associated with visitor activities. The IMPLAN model incorporates multipliers that estimate these impacts based on estimates of visitor output.

Table 3
Aircraft Operations, Percent Itinerant, and Transient Arrivals
2003

	ESTIMATED GA OPERATIONS	% ITINERANT	ESTIMATED ITINERANT GA OPERATIONS	ESTIMATED TRUE TRANSIENT ARRIVALS
Commercial Service Airports	200,300	69.0%	144,440	23,840
General Aviation Airports	895,510	56.9%	509,730	85,140
Total Aircraft Operations	1,095,810	59.1%	654,170	108,980

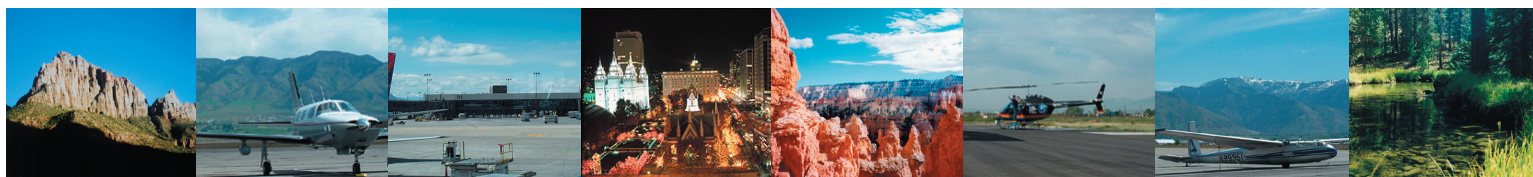
Table 4
Transient Arrivals, GA Visitors, Visitor-Days, and Expenditures
2003

	ESTIMATED TRUE TRANSIENT ARRIVALS	ESTIMATED GENERAL AVIATION VISITORS	TOTAL ANNUAL NUMBER OF DAYS STAYED	ANNUAL GENERAL AVIATION VISITOR EXPENDITURES
Commercial Service Airports	23,840	81,660	171,480	\$11,317,700.00
General Aviation Airports	85,140	250,590	513,430	\$33,742,700.00
Total Visitors and Expenditures	108,980	332,250	684,910	\$45,060,400.00

Table 5
Total Weighted-Average Impact Multipliers

STANDARD INDUSTRIAL CLASSIFICATION	TOTAL EMPLOYMENT MULTIPLIER	TOTAL PAYROLL MULTIPLIER	TOTAL OUTPUT MULTIPLIER
Aviation-Related Tenant Multiplier	1.907	1.578	1.677
Government Tenant Multiplier	1.844	1.631	1.755
Visitor Multiplier	1.411	1.691	1.749
Source: IMPLAN Input-Output Tables			





The Economic Impact of Commercial Service

The Economic Impact of Commercial Service

There are six commercial service airports in Utah that provide the state's residents, businesses, and tourism industry with access to scheduled air service. Each of the six airports and their tenants were surveyed to estimate expenditures and employment and to determine its effect on the economy. The economic impacts of these tenants and their activities, as well as the impacts of visitors who use scheduled airline service, were calculated as part of this analysis.

Airport and FAA data show that in 2002, there were nearly 5.1 million originating commercial enplanements at Utah's airports, most of them at Salt Lake City International. These traffic numbers show that more than three million visitors (representing 12.8 million visitor days) are estimated to have traveled to Utah on scheduled air service in 2002. Air travel visitors create direct jobs and payroll in all sectors of the state's economy through their expenditures for goods and services. Based on data through September, a similar number of visitors will arrive in Utah via scheduled air service in 2003.

More than three million visitors traveled to Utah on scheduled air service in 2002.

The following sections summarize the employment, payroll, and output benefits attributable to commercial service in Utah. For this section, the economic impacts at Salt Lake City International are discussed separately from the other commercial service airports in the state. The impact statistics of each airport appear in the appendix to this report.

Commercial Service Employment Impacts

For the purposes of this study, employment estimates were based on "full-time equivalent" (FTE) positions, where two part-time jobs are generally assumed to equal one full-time job. Employment impacts were determined for on-airport tenants, as well as for visitors.

Commercial Service Tenant Employment – Salt Lake City International

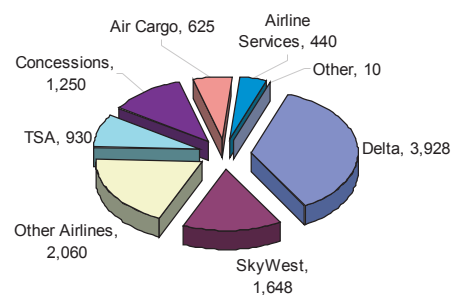
The findings of the study indicate that the on-airport, commercial service-related tenant categories

employing the most workers at Salt Lake City International in 2003 were airlines, federal- and state-level government entities, and concessions (including auto rental companies).

It is estimated that direct tenant employment impacts attributable to commercial airline service at Salt Lake City International totaled more than 10,890 jobs. Over 3,900, or about one-third, of these jobs were involved with Delta Air Lines' hub operation. Another 1,600 jobs belonged to Delta's regional partner at Salt Lake City International, SkyWest Airlines. The airport's other ten airlines combined to employ about 2,100 employees. About 1,250 employees worked in concessions at the airport, including shops and food and beverage

establishments in the terminal, auto rental, and parking. Approximately 930 jobs at the airport were TSA security screeners, and about 625 employees worked at the airport's cargo operations. Airline service personnel, such as Skycaps, refueling crews, and catering staff, accounted for approximately 440 jobs. **Exhibit 3, Salt Lake City International Commercial Service Employment**, below shows the breakdown of employment at Salt Lake City International.

Exhibit 3
Salt Lake City International Commercial Service Employment



Total Employment (SLC): 10,890

As a result of direct tenant employment, the multiplier effect creates additional secondary employment. Secondary employment added about 8,930 additional full-time positions to the Utah workforce; thus, the total (direct and secondary) tenant employment contribution of Salt Lake City International to the state's economy is approximately 19,824 full-time positions.

THE ECONOMIC IMPACT OF COMMERCIAL SERVICE

The tenant employment impacts of the commercial service-related tenants at Salt Lake City International are displayed in **Table 6, Commercial Service Tenant Employment**, along with Utah's five other commercial service airports.

Commercial Service Tenant Employment – Other Utah Airports

Although the majority of Utah's population is centered within 50 miles of Salt Lake City, there are numerous smaller communities and tourist destinations in more remote parts of the state. Given the size of the State of Utah (84,904 square miles), it is important for scheduled airlines to serve other Utah communities and provide convenient access points to the nation's air transportation system. There are four rural airports in Utah that accomplish this. Cedar City and St. George have airline service provided by SkyWest Airlines, while Moab and Vernal are served by Salmon Air from Salt Lake City. These airports serve five national parks, two national recreation areas, seven national monuments, and twelve state parks. In addition, these airports serve business and leisure travelers to those cities. Additionally, Bryce Canyon Airport accommodates many chartered sightseeing flights.

Together, the four commercial service airports outside of Salt Lake City employ more than 91 full-time workers in commercial-service related jobs. These jobs include airline employees, TSA screeners, rental car agencies, and other concessions.

As a result of direct tenant employment, the multiplier effect creates additional secondary jobs in Utah. This secondary employment added nearly 75 additional full-time positions to Utah's workforce. The total employment impact of commercial service-related tenants at Utah's airports (excluding SLCIA) amounts to 166 full-time positions.

The employment impacts of the commercial service-related tenants at Utah's commercial service airports are summarized in **Table 6, Commercial Service Tenant Employment**.

Commercial Service Visitor Employment – Salt Lake City International

Visitors that travel to Utah on commercial airline service normally spend money during their visit, thereby supporting additional employment. These visitor-related jobs were established by first estimating the number of commercial service visitors arriving in Utah, then identifying typical spending trends. The direct employment associated with commercial service visitors impact a variety of sectors; however, the majority of these jobs are attributed to the lodging, food and drink, recreation and entertainment, and retail sectors. The direct employment supported by commercial service visitors arriving in Utah through Salt Lake City International was estimated to be approximately 54,050 full-time positions in 2003, while the secondary impacts attributed to visitor expenditures resulted in nearly 22,240 positions. The total employment impact of commercial service visitors resulted in nearly 76,300 full-time positions. These jobs are in addition to the aforementioned tenant employment. **Table 7, Commercial Service Visitor Employment**, presents the estimated employment impacts associated with Salt Lake City International's commercial service visitors, as well

as those at Utah's other commercial service airports. See **Appendix Table A-6, Commercial Service Visitor Employment**.

Commercial Service Visitor Employment – Other Utah Airports

A number of visitors to the State of Utah arrive via the state's five other smaller commercial service airports at Bryce Canyon, Cedar City, Moab, St. George, and Vernal. The

The Bryce Canyon, Cedar City, Moab, St. George, and Vernal airports serve nearby national parks and recreational attractions, as well as business and leisure travelers to those cities.

Table 6
Commercial Service Tenant Employment
2003

AIRPORT NAME	DIRECT COMMERCIAL SERVICE TENANT EMPLOYMENT	SECONDARY COMMERCIAL SERVICE TENANT EMPLOYMENT	TOTAL COMMERCIAL SERVICE TENANT EMPLOYMENT
Salt Lake City International	10,891.0	8,932.5	19,823.5
Other Commercial Service Airports	91.5	74.5	166.0
Total Commercial Service Tenant Employment	10,982.5	9,007.0	19,989.5



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direct employment supported by commercial service visitors to these cities was estimated at approximately 581 full-time positions in 2003. Secondary impacts resulting from visitor expenditures added another 239 employees, for a total commercial service visitor employment impact of approximately 820 full-time positions. This data is summarized in **Table 7, Commercial Service Visitor Employment**. See also Appendix Table A-6.

Total Employment – Commercial Service Airports

On-airport tenants and visitors to Utah commercial service airports were estimated to generate over 65,600 full-time positions, and the multiplier effect was estimated to include almost 31,500 additional positions. Total employment resulting from Utah's commercial service airports was approximately 97,100 full-time jobs. These results are summarized in **Table 8, Total Commercial Service Employment**.

Commercial Service Payroll Impacts

The employment that is supported by the state system of airports results in the introduction of payroll expenditures into the statewide economy. The payroll impacts associated with the previously identified employment

benefits are discussed in the following sections.

Commercial Service Tenant Payroll – Salt Lake City International

Direct payroll impacts of wages paid to employees of on-airport, commercial service-related tenants at SLCIA totaled \$416.4 million in 2003. As the employees of on-airport, aviation-related tenants spend their payroll, the monies continue to circulate in the state's economy, which generates additional employment and subsequent payroll. These secondary impacts accounted for nearly \$247.2 million; therefore, the total tenant payroll impact attributable to commercial service tenants at Salt Lake City International was estimated as approximately \$663.7 million. **Table 9, Commercial Service Tenant Payroll**, shows these payroll impacts at Salt Lake City International, along with those at Utah's other commercial service airports. See also **Appendix Table A-9, Commercial Service Tenant Payroll**.

Commercial Service Tenant Payroll – Other Utah

Table 7
Commercial Service Visitor Employment
2003

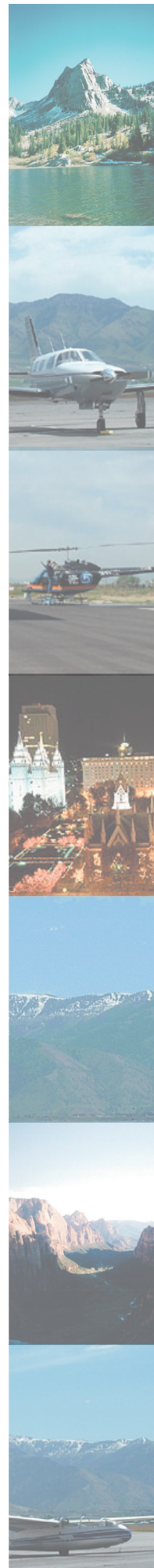
AIRPORT NAME	DIRECT COMMERCIAL SERVICE VISITOR EMPLOYMENT	SECONDARY COMMERCIAL SERVICE VISITOR EMPLOYMENT	TOTAL COMMERCIAL SERVICE VISITOR EMPLOYMENT
Salt Lake City International	54,049.0	22,239.0	76,288.0
Other Commercial Service Airports	581.0	239.0	820.0
Total Commercial Service Visitor Employment	54,630.0	22,478.0	77,108.0

Table 8
Total Commercial Service Employment
2003

AIRPORT NAME	TOTAL DIRECT COMMERCIAL SERVICE EMPLOYMENT	TOTAL SECONDARY COMMERCIAL SERVICE EMPLOYMENT	TOTAL COMMERCIAL SERVICE EMPLOYMENT
Salt Lake City International	64,940.0	31,171.5	96,111.5
Other Commercial Service Airports	672.5	313.5	986.0
Total Commercial Service Employment	65,612.5	31,485.0	97,097.5

Table 9
Commercial Service Tenant Payroll
2003

AIRPORT NAME	DIRECT COMMERCIAL SERVICE TENANT PAYROLL	SECONDARY COMMERCIAL SERVICE TENANT PAYROLL	TOTAL COMMERCIAL SERVICE TENANT PAYROLL
Salt Lake City International	\$416,420,800	\$247,238,700	\$663,659,500
Other Commercial Service Airports	\$2,656,800	\$1,577,300	\$4,234,100
Total Commercial Service Tenant Payroll	\$419,077,600	\$248,816,000	\$667,893,600



THE ECONOMIC IMPACT OF COMMERCIAL SERVICE

Airports

Tenants at the five smaller commercial service airports in Utah paid their employees over \$2.66 million in direct payroll in 2003. Secondary payroll attributed to circulation of direct payroll throughout the state's economy accounted for another \$1.57 million in wages. Total commercial service tenant payroll impacts at Utah's four smaller airports were more than \$4.23 million in 2003. **Table 9** summarizes tenant payroll impacts for these airports.

Commercial Service Visitor Payroll – Salt Lake City International

Direct visitor payroll impacts include the salary and benefits paid to workers employed at visitor-related businesses and other service industries that are typically utilized by commercial service visitors. The statewide direct payroll impacts related to commercial service visitors arriving at SLCIA were estimated at over \$1.11 billion, and more than \$770 million in additional payroll was attributable to secondary impacts. This resulted in a total commercial service visitor payroll of over \$1.88 billion at Salt Lake City International in 2003. **Table 10**, *Commercial Service Visitor Payroll*, displays the estimated visitor-related payroll impacts at SLCIA, along with those at Utah's other commercial service airports. See also **Appendix Table A-11**, *Commercial Service Visitor Payroll*.

Commercial Service Visitor Payroll – Other Utah

Airports

As discussed, a significant number of visitors to the state use Utah's smaller commercial service airports at Bryce Canyon, Cedar City, Moab, St. George, and Vernal. These visitors generate jobs in tourist and visitor-related industries. The direct payroll for these jobs was estimated at \$11.99 million in 2003, and responding of these monies creates secondary payroll impacts of about \$8.26 million. These impacts add up to a combined commercial service visitor impact of \$20.23 million at Utah's smaller commercial service airports. **Table 10** summarizes these impacts.

Total Payroll – Commercial Service Airports

Table 11, *Total Commercial Service Payroll*, presents the estimated total payroll impact of on-airport tenants and visitors at Utah's commercial service airports in 2003. Utah's commercial airport system generated over \$1.54 billion in direct payroll impacts, and approximately \$1.03 billion in secondary payroll impacts. The direct and secondary payroll benefits associated with Utah commercial service tenants and visitors totaled over \$2.57 billion.

Commercial Service Output Impacts

As stated previously, tenant output is commonly assumed to be the sum of average annual capital expenditures and annual gross sales. Since government tenants typically do not generate sales, their output is derived from the

Table 10
Commercial Service Visitor Payroll
2003

AIRPORT NAME	DIRECT COMMERCIAL SERVICE VISITOR PAYROLL	SECONDARY COMMERCIAL SERVICE VISITOR PAYROLL	TOTAL COMMERCIAL SERVICE VISITOR PAYROLL
Salt Lake City International	\$1,113,409,400	\$770,386,300	\$1,883,795,700
Other Commercial Service Airports	\$11,968,600	\$8,257,200	\$20,225,800
Total Commercial Service Visitor Payroll	\$1,125,378,000	\$778,643,500	\$1,904,021,500

Table 11
Total Commercial Service Payroll
2003

AIRPORT NAME	TOTAL DIRECT COMMERCIAL SERVICE PAYROLL	TOTAL SECONDARY COMMERCIAL SERVICE PAYROLL	COMBINED TOTAL COMMERCIAL SERVICE PAYROLL
Salt Lake City International	\$1,529,830,200	\$1,017,625,000	\$2,547,455,200
Other Commercial Service Airports	\$14,625,400	\$9,834,500	\$24,459,900
Total Commercial Service Payroll	\$1,544,455,600	\$1,027,459,500	\$2,571,915,100

Payroll benefits
associated with
Utah commercial
service tenants
and visitors
totaled over \$2.57
billion.



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sum of average annual capital expenditures, payroll, and operating expenses. The output of commercial service visitors is considered to be the expenditures made during their visits. The following sections present the estimated output of Utah's commercial service airports.

Commercial Service Tenant Output – Salt Lake City International

As on-airport tenants spend money, their expenditures filter through the economy. For example, if an airline constructs a maintenance hangar at an airport, a significant amount of money would be spent in the local economy for construction materials, labor, and other related services.

The estimated total direct output of on-airport tenants at Salt Lake City International was more than \$1.27 billion, while secondary impacts were estimated to account for over \$895.2 million. Combined, the direct and secondary output benefits of airport tenants at SLCIA were estimated at \$2.17 billion. **Table 12, Commercial Service Tenant Output**, displays the direct, secondary, and total tenant output of Salt Lake City International, along with the state's other commercial service airports.

Commercial Service Tenant Output – Other Utah Airports

The total value of goods and services linked to on-airport commercial service-related tenants at Utah's five

smaller commercial service airports was approximately \$2.08 million in 2003. This direct output created a ripple-effect secondary output of approximately \$1.46 million. The combined total output of tenants at these smaller commercial service airports was just under \$3.55 million in 2003. Table 12 shows the estimates of direct, secondary, and total output of tenants at Utah's commercial service airports. See **Appendix Table A-14, Commercial Service Tenant Output**.

Commercial Service Visitor Output – Salt Lake City International

The direct output of commercial airline service visitors is typically comprised of expenditures for food and beverages, lodging, retail, entertainment, and other related services. The total direct output of visitors that entered Utah through Salt Lake City International was estimated to be approximately \$1.52 billion, and the secondary output added another \$1.14 billion. Therefore, visitors arriving in Utah via scheduled airline service were responsible for approximately \$2.67 billion in output in 2003. The total estimated output of commercial service visitors passing

through Salt Lake City International is presented in **Table 13, Commercial Service Visitor Output**, along with output from visitors using the state's other commercial service airports.

Commercial Service Visitor Output – Other Utah Airports

Utah's commercial service airports produced a total statewide output of nearly \$4.87 billion in 2003.

Table 12
Commercial Service Tenant Output
2003

AIRPORT NAME	DIRECT COMMERCIAL SERVICE TENANT OUTPUT	SECONDARY COMMERCIAL SERVICE TENANT OUTPUT	TOTAL COMMERCIAL SERVICE TENANT OUTPUT
Salt Lake City International	\$1,273,829,400	\$895,201,700	\$2,169,031,100
Other Commercial Service Airports	\$2,082,600	\$1,463,600	\$3,546,200
Total Commercial Service Tenant Output	\$1,275,912,000	\$896,665,300	\$2,172,577,300

Table 13
Commercial Service Visitor Output
2003

AIRPORT NAME	DIRECT COMMERCIAL SERVICE VISITOR OUTPUT	SECONDARY COMMERCIAL SERVICE VISITOR OUTPUT	TOTAL COMMERCIAL SERVICE VISITOR OUTPUT
Salt Lake City International	\$1,524,247,200	\$1,143,085,800	\$2,667,333,000
Other Commercial Service Airports	\$16,391,750	\$12,292,850	\$28,684,600
Total Commercial Service Visitor Output	\$1,540,638,950	\$1,155,378,650	\$2,696,017,600



THE ECONOMIC IMPACT OF COMMERCIAL SERVICE

As with Utah visitors passing through Salt Lake City International upon arrival, airline passengers visiting other areas of the state create output in the form of expenditures on food, lodging, entertainment, etc. The total direct output of visitors at the state's five smaller commercial service airports was estimated at \$16.39 million in 2003. The secondary impact of these expenditures added another \$12.29 million to the state's economy, for a total visitor impact of \$28.68 million.

Table 13 summarizes these impacts.

Total Output – Commercial Service Airports

Statewide direct total output from commercial service tenants and visitors was estimated at nearly \$2.82 billion, while secondary impacts were estimated at approximately \$2.05 billion; thus, commercial service airports produced a total statewide output of nearly \$4.87

billion. **Table 14**, *Commercial Service Output*, presents the total combined benefits of tenant and visitor output.

Table 14
Commercial Service Output
2003

AIRPORT NAME	TOTAL DIRECT COMMERCIAL SERVICE OUTPUT	TOTAL SECONDARY COMMERCIAL SERVICE OUTPUT	TOTAL COMBINED COMMERCIAL SERVICE OUTPUT
Salt Lake City International	\$2,798,076,600	\$2,038,287,500	\$4,836,364,100
Other Commercial Service Airports	\$18,474,350	\$13,756,450	\$32,230,800





The Economic Impact of General Aviation

The Economic Impact of General Aviation

Including the six airports that provide commercial airline service, each of the 47 airports in Utah's aviation system accommodate the varied needs of general aviation users – activities including corporate aviation, sightseeing flights, air ambulance, agricultural spraying, pilot training, and recreational flights, to name a few. While these activities are not always visible to the general public, such activities provide invaluable services to every member of the community. Appendix A includes data on annual general aviation activity in Utah.

Just like impacts at commercial service airports, general aviation tenant impacts result from the employment, payroll, and output associated with the services and products sold by on-airport, general aviation-related businesses. These businesses employ a significant number of workers, such as line mechanics, flight instructors, aircraft salespeople, and sightseeing tour operators. Additionally, many off-airport businesses provide services and/or supplies to these businesses. As a result, the employment, payroll, and output impacts attributable to general aviation airport tenants extend beyond airport boundaries, resulting in benefits throughout regional economies and the entire state.

The arrival of general aviation visitors, whether traveling for business or pleasure, results in additional spending for products and services such as hotels, transportation, food and beverages, entertainment, and retail purchases. This spending supports many service-related and tourism positions, and also produces successive waves of employment, payroll, and output as it circulates through the Utah economy.

The following section details the impact of general aviation tenants and visitors at Utah's six commercial service and 41 general aviation airports. Airport-specific data can be found in the appendix to this report.

General Aviation Employment Impacts

As with the discussions of employment at commercial

service airports, for the purposes of this study, employment estimates for general aviation airports were based on "full-time equivalent" (FTE) positions, wherein two part-time jobs are generally assumed to equal one full-time job. Employment impacts were determined for on-airport tenants, as well as for visitors.

General Aviation Tenant Employment

Total tenant employment is comprised of two groups of jobs: those involved directly in on-airport activities, and those employed in supporting sectors of the economy. For example, direct employment would include airframe and powerplant technicians at an FBO; supporting employment would include the workers at the FBO's parts supplier. In 2003, general aviation businesses at the 47 airports in Utah employed approximately 3,750 full-time positions. These jobs induced additional employment in supporting sectors of over 3,250 full-time jobs. As a result, total employment of general aviation tenants was 7,002 jobs. The majority of these, over 4,800, can be attributed to general aviation activity at Salt Lake City International Airport. See also **Appendix Table A-3, General Aviation Tenant Employment**.

General Aviation Visitor Employment

Visitors to Utah airports that arrive via general aviation aircraft generally spend money both at the airport and in the towns and attractions they visit while on the ground. This spending on goods and services creates jobs in the industries that provide them, and an additional secondary impact is created in those industries' supporting sectors. For example, while visiting a town, general aviation visitors may spend money on lodging at a local hotel, thereby creating jobs for hotel staff. The hotel staff requires certain goods and services to do its job, and the provision of these creates additional secondary jobs. In 2003, direct employment as a result of general aviation visitors in Utah was estimated at about 1,600 jobs. The secondary impact of visitor spending created another 657 jobs, for a total general aviation-visitor impact of over 2,250 jobs. See **Appendix Table A-5, General Aviation Visitor Employment**.

Total Employment – General Aviation Airports

The combined tenant and visitor-related employment resulting from general aviation activity in Utah in 2003

General aviation activities provide invaluable services to every member of the community.

THE ECONOMIC IMPACT OF GENERAL AVIATION

was over 5,340 direct full-time positions. Secondary impacts arising from re-spending throughout the economy created an additional 3,910 jobs, for a total of about 9,260 full-time positions. General aviation employment is summarized in **Table 15, General Aviation Employment Impact Summary**.

General Aviation Payroll Impacts

The employment that is supported by the state system of general aviation airports results in the introduction of payroll expenditures into the statewide economy. The payroll impacts associated with the employment benefits highlighted above are discussed in the following sections.

General Aviation Tenant Payroll

Tenants at general aviation airports in Utah paid their employees direct wages of \$126.90 million in 2003. Payroll of employees engaged in supporting industries were paid an additional \$77.56 million, for a total of \$204.46 million in general aviation-related tenant payroll. See **Appendix Table A-8, General Aviation Tenant Payroll**.

General Aviation Visitor Payroll

As discussed above, visitors arriving in Utah via general aviation aircraft provide a level of expenditures which create jobs in the communities served by each airport. In 2003, employees in these jobs earned \$32.91 million. Employees of secondary, supporting industries earned an additional \$22.77 million. These impacts combined for a \$55.68 million payroll impact resulting from general aviation visitors. See **Appendix Table A-10, General Aviation Visitor Payroll**.

Total Payroll – General Aviation Airports

The impact of direct tenant and visitor payroll on Utah's economy in 2003 was \$159.81 million. Secondary tenant and visitor wages paid to supporting industries joined for another \$100.33 million in payroll impacts. Therefore, the combined payroll resulting from the operation of general aviation-related businesses was \$260.14 million in 2003. **Table 16, General Aviation Payroll Impacts Summary**, details these impacts.

General Aviation Output Impacts

The commercial service airports section detailed how output is commonly estimated as the sum of average annual capital expenditures and annual gross sales of each tenant. The same is true of general aviation tenants. Since government tenants typically do not generate sales, the output of these tenants is calculated as the sum of average annual capital expenditures, payroll, and operating expenses. The output of general aviation visitors is considered to be the expenditures made during their visits. The following sections present the estimated output of general aviation in Utah.

In 2003, the total output from general aviation in the State of Utah was over \$815.52 million.

General Aviation Tenant Output

The general aviation-related tenants at Utah's airports provide a wide variety of goods and services to the public. In 2003, the value of these goods and services was \$427.38 million. Secondary output induced by that direct output amounted to an additional \$309.29 million, for a total output of \$736.67 million. See **Appendix Table A-13, General Aviation Tenant Output**.

Table 15
General Aviation Employment Impact Summary
2003

IMPACT TYPE	DIRECT IMPACT	SECONDARY IMPACT	TOTAL IMPACT
General Aviation Tenant Employment	3,747.5	3,254.5	7,002.0
General Aviation Visitor Employment	1,597.5	657.0	2,254.5
Total General Aviation Employment	5,345.0	3,911.5	9,256.5

Table 16
General Aviation Payroll Impacts Summary
2003

IMPACT TYPE	DIRECT IMPACT	SECONDARY IMPACT	TOTAL IMPACT
General Aviation Tenant Payroll	\$126,896,000	\$77,559,100	\$204,455,100
General Aviation Visitor Payroll	\$32,908,500	\$22,770,000	\$55,678,500
Total General Aviation Payroll	\$159,804,500	\$100,329,100	\$260,133,600



UTAH AIRPORTS ECONOMIC IMPACT STUDY

General Aviation Visitor Output

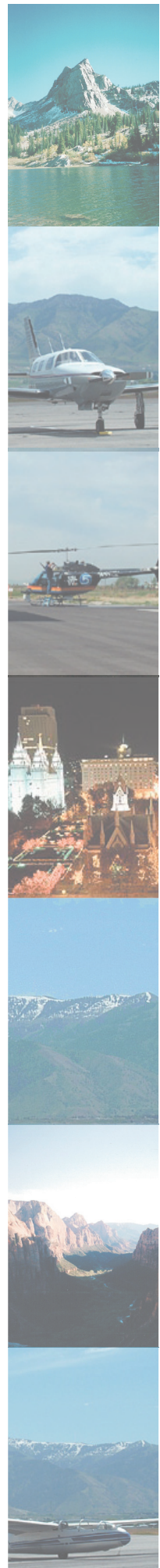
Expenditures by visitors to Utah arriving by general aviation aircraft amounted to \$45.06 million in 2003. This spending stimulated a secondary impact in visitor-related industries (lodging, food and beverage, etc.) of \$33.79 million, for a total general aviation visitor impact of \$78.85 million. See **Appendix Table A-15, General Aviation Visitor Output**.

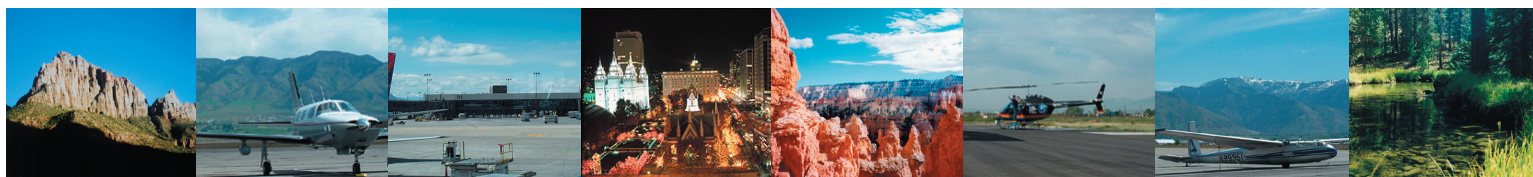
Total Output – General Aviation Airports

The direct value of goods and services produced in Utah that can be linked to general aviation totaled over \$472.44 million in 2003. Secondary output from these general aviation tenants and visitors was \$343.08 million. Therefore, the total output from general aviation in the State of Utah in 2003 was over \$815.52 million. **Table 17, General Aviation Output Impacts Summary**, summarizes these figures.

Table 17
General Aviation Output Impacts Summary
2003

IMPACT TYPE	DIRECT IMPACT	SECONDARY IMPACT	TOTAL IMPACT
General Aviation Tenant Output	\$427,382,500	\$309,291,600	\$736,674,100
General Aviation Visitor Output	\$45,060,400	\$33,792,000	\$78,852,400
Total General Aviation Output	\$472,442,900	\$343,083,600	\$815,526,500





The Qualitative Benefits of Utah's Airports

The Qualitative Benefits of Utah's Airports

In the addition to the quantitative benefits presented in the preceding sections of this report, there are many qualitative benefits that contribute to the overall impact of the airport system. Qualitative benefits include those factors for which dollar values cannot be readily assigned, but regularly occur throughout the airport system. These benefits enhance the quality of life, health, welfare, and safety of the citizens of Utah.

During the data collection phase of this analysis, specific examples of the qualitative benefits provided by airports throughout the Utah system were identified through surveys and airport visits. The ability of each airport to provide such benefits is greatly influenced by the demographic and physical characteristics of individual market areas and the availability of services and facilities. While the activities that occur may vary throughout the system, each airport contributes in some way to the quality of life of Utahns. Some examples of the qualitative benefits of general aviation at Utah system airports include the following:

- Facilitating emergency medical transport—Blanding Municipal is home to Eagle Air Med, a med-evac company that serves much of the Four Corners area
- Providing local police and fire support
- Assisting wildfire control operations – The airports at Cedar City, Morgan, Ogden, Provo, and Tooele are each home to a wildfire operations center.
- Assisting search-and-rescue operations – More than a quarter of Utah's 47 airports have Civil Air Patrol wings, assisting in searching for downed aircraft and missing persons
- Supporting the U.S. military and other government organizations – Salt Lake City International, Salt Lake City Municipal II, and Spanish Fork-Springville airports each have a National Guard post on-airport; further, many airports support military training exercises.
- Assisting with prisoner transport
- Facilitating mosquito control – Weber County

Qualitative benefits enhance the quality of life, health, welfare, and safety of the citizens of Utah.

- Mosquito is located at Ogden-Hinckley airport
- Assisting with traffic reporting – Bountiful SkyPark and Salt Lake City International are home to some of Salt Lake City's traffic and news helicopters
- Assisting with weather forecasting – The National Weather Service has an operations center at both Salt Lake City International and Cedar City Regional
- Supporting statewide agricultural activities – Many airports in Utah support aerial applicators, and Richfield is the location of the Utah Division of Wildlife's Predator Control operation
 - Supporting statewide hunting and fishing venues – For example, Dutch John airport allows easier access to fishing at Flaming Gorge
 - Providing entertainment opportunities (e.g., museums, air shows) – For example, a museum at Wendover Airport depicts the airport's role in training airmen for duty in World War II; Parowan is world-renown for soaring and gliding, and Heber and Logan-Cache airports have air shows frequently
 - Hosting school field trips and other educational events
- Serving as a staging area for community events

Although not included in the analysis in this report, Hill Air Force Base in Ogden is an important part of Utah's aviation system. For over sixty years, Hill Air Force Base has played a vital role in the nation's defense as an Air Logistics Center for the 388th Fighter Wing of the Air Combat Command, and the 419th Fighter Wing of the Air Force Reserves. In addition, Hill Air Force Base is a one-of-a-kind Department of Defense facility for computer topography, strategic missile integration, and advanced composite manufacturing. Nearby, the Utah Test and Training Range is the nation's largest Department of Defense controlled airspace with 17,000 square miles. Hill Air Force Base is not only vital to the national defense, but is also vital to the community, employing over 22,000 people (civilian and military), and adding over \$2.1 billion annually to the area's economy.

Table 18, *Activities at Public-Use Airports*, shows the relative frequencies with which these activities occur at Utah's 47 public-use airports.

THE QUALITATIVE BENEFITS OF UTAH'S AIRPORTS

Table 18
Activities at Public-Use Airports

Associated City	Airport Name	Recreational Flying	Ag Spraying	Corporate/Business	Aerial Inspections	Air Cargo	Visitor Gateway	Staging of Community Events	Police	Prisoner Transfer	Military	Career Training	Search & Rescue/C.A.P.	Environmental Patrol	Medical Evacuation	Medical Shipments/Patient Transfers	Forest/Wildfire Fighting	Aerial Photography	Real Estate Tours	Aerial Advertising	Traffic/News Reporting	Air shows
Commercial Service Airports																						
Bryce Canyon	Bryce Canyon	M	L	L	L	L	M	L	L	L	L	L	L	L	L	L	M	L	L	L	L	L
Cedar City	Cedar City Regional	H	M	H	L	H	H	L	M	M	L	H	M	M	M	M	M	L	L	L	L	L
Moab	Canyonlands Field	H	L	M	L	M	H	L	L	L	L	L	M	L	M	M	M	L	L	L	L	L
St. George	Salt Lake City International	M	L	H	L	H	H	L	M	L	H	M	M	L	M	M	L	L	L	L	H	L
Salt Lake City	Saint George Municipal	H	L	H	L	H	H	L	M	L	L	H	H	L	H	H	H	M	L	L	H	L
Vernal	Vernal-Uintah County	M	M	H	M	H	M	L	L	L	M	L	L	L	H	H	M	M	L	L	M	L
General Aviation Airports																						
Beaver	Beaver Municipal	M	M	L	L	L	M	L	L	L	L	L	L	L	M	L	L	L	L	L	L	L
Blanding	Blanding Municipal	M	M	H	H	L	M	L	M	L	L	L	M	M	M	M	H	M	L	L	L	L
Bluff	Bluff	H	L	L	L	L	M	M	L	L	L	L	M	L	L	L	L	L	L	L	L	L
Bountiful	Bountiful Skypark	H	L	H	M	M	M	L	M	L	L	H	H	L	H	M	L	H	M	M	M	L
Brigham City	Brigham Municipal	H	H	H	M	M	M	M	M	L	M	M	M	L	M	M	M	H	L	L	M	L
Delta	Delta Municipal	M	L	M	L	M	L	L	L	L	M	L	L	L	M	M	L	L	L	L	L	L
Duchesne	Duchesne Municipal	L	M	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L
Dutch John	Dutch John	H	L	L	L	L	H	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L
Escalante	Escalante Municipal	H	M	M	L	L	L	L	M	L	L	L	H	L	M	M	M	L	L	L	L	L
Fillmore	Fillmore	L	M	L	L	L	L	L	M	L	L	L	L	L	M	L	M	L	L	L	L	L
Glen Canyon	Bullfrog Basin	M	L	L	L	M	H	L	M	L	L	L	M	M	M	M	L	M	L	L	L	L
Green River	Green River Municipal	H	L	H	L	H	H	L	M	L	L	L	M	L	M	M	M	M	L	L	L	L
Halls Crossing	Cal Black Memorial	H	L	M	L	L	H	L	M	L	L	L	M	L	M	L	L	L	L	L	L	L
Hanksville	Hanksville Municipal	H	M	M	L	L	L	L	M	L	L	L	H	L	M	M	M	L	L	L	L	L
Heber City	Heber City Municipal	H	L	H	L	L	H	M	L	L	M	M	M	L	L	L	M	M	L	L	L	M
Huntington	Huntington Municipal	H	M	M	M	L	M	L	M	L	L	M	M	L	L	L	M	M	L	L	L	L
Hurricane	Hurricane	H	L	M	L	L	H	M	M	L	M	L	M	L	M	M	M	M	L	L	L	L
Junction	Junction	M	H	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L
Kanab	Kanab Municipal	M	L	M	L	L	M	L	M	M	L	L	M	L	H	H	H	L	L	L	L	L
Loa	Wayne Wonderland	H	M	M	L	L	L	L	M	L	L	L	H	L	M	M	M	L	L	L	L	L
Logan	Logan-Cache	H	M	H	M	L	M	L	M	L	M	H	M	L	M	M	M	L	L	L	L	M
Manila	Manila	H	M	M	L	L	L	L	M	L	L	L	H	L	M	M	M	L	L	L	L	L
Manti	Manti-Ephraim	H	M	M	L	L	L	L	M	L	L	L	H	L	M	M	M	L	L	L	L	L
Milford	Milford Municipal	H	M	M	H	L	L	L	L	L	M	L	M	L	H	H	H	M	L	L	L	L
Monticello	Monticello	H	M	M	L	L	L	L	M	L	L	L	H	L	M	M	M	L	L	L	L	L
Monument Valley	Monument Valley	H	L	L	L	L	H	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L
Morgan	Morgan County	H	M	H	L	L	M	L	M	L	L	H	L	M	L	L	H	L	L	L	L	L
Mount Pleasant	Mount Pleasant	H	L	L	L	L	L	L	L	L	L	H	L	L	L	L	L	L	L	L	L	L
Nephi	Nephi Municipal	M	H	H	L	L	L	L	L	L	L	L	L	L	L	L	H	L	L	L	L	L
Ogden	Ogden-Hinckley	H	M	H	M	M	M	L	L	L	M	H	M	L	M	M	H	M	L	L	L	L
Panguitch	Panguitch Municipal	H	M	M	L	L	L	L	M	L	L	L	H	L	M	M	M	L	L	L	L	L
Parowan	Parowan	H	H	M	L	M	L	L	L	L	H	L	L	L	L	L	L	L	L	L	L	L

UTAH AIRPORTS ECONOMIC IMPACT STUDY

Table 18
Activities at Public-Use Airports, Continued

Associated City	Airport Name	Recreational Flying	Ag Spraying	Corporate/Business	Aerial Inspections	Air Cargo	Visitor Gateway	Staging of Community Events	Police	Prisoner Transfer	Military	Career Training	Search & Rescue/C.A.P.	Environmental Patrol	Medical Evacuation	Medical Shipments/Patient Transfers	Forest/Wildfire Fighting	Aerial Photography	Real Estate Tours	Aerial Advertising	Traffic/News Reporting	Air shows
Price	Carbon County	H	L	M	M	H	M	L	M	M	L	M	M	L	H	M	H	M	M	L	L	L
Provo	Provo Municipal	H	L	H	L	M	M	L	L	L	M	H	M	L	M	M	H	M	L	M	M	L
Richfield	Richfield Municipal	H	M	M	M	L	M	M	M	H	L	M	H	M	H	H	H	H	M	L	L	L
Roosevelt	Roosevelt Municipal	H	M	M	L	L	L	L	M	L	L	L	H	L	M	M	M	L	L	L	L	L
Salina	Salina-Gunnison	M	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L
Salt Lake City	Salt Lake City Municipal II	H	L	M	M	L	M	L	M	M	H	H	M	L	L	L	L	M	M	L	L	L
Spanish Fork	Spanish Fork-Springville	H	H	H	L	L	L	L	H	H	H	H	L	L	L	L	M	M	M	M	L	L
Tooele	Bolinder Field-Tooele Valley	H	M	L	L	L	L	L	M	L	M	M	M	L	L	L	H	L	L	L	L	L
Wendover	Wendover Municipal	M	L	M	L	L	M	M	M	L	M	M	L	L	M	M	M	L	L	L	L	L

H = High level of activity

M = Medium level of activity

L = Low level of activity





The Business Use of Utah's Airports

The Business Use of Utah's Airports

Numerous businesses throughout the United States, including those whose products and/or services are not aviation-related, depend on air service to enhance their productivity and efficiency. In addition to quantifying the economic benefits associated with the activities of aviation-related airport tenants, and of visitors who arrive in Utah via air travel, this study has presented many of the qualitative health, safety, and welfare benefits associated with the Utah system of airports. However, a comprehensive representation of the benefits of the airport system necessitates the identification of the value-added benefits to non-aviation businesses resulting from the daily operation of the system.

The aviation activities supported by Utah's airports are essential to economic vitality. Without them, Utah would be much less effective in participating in the global community and marketplace, as aviation enables the efficient movement of people and goods to markets around the world. Often, there are no practical alternatives to air transportation; thus, access to safe, rapid, and efficient transportation allows businesses to generate sales, increase production, and maximize productivity. Competitive growth in the global and domestic economies is becoming increasingly more dependent on aviation. Without the availability of the Utah airport system, the productivity and employment levels of many employers would be adversely impacted.

Many of the nation's leading employers that use general aviation as a business tool are members of the National Business Aircraft Association (NBAA). The NBAA's Business Aviation Fact Book 2002 indicates that 73 percent of all companies included in the Fortune 500 operate business aircraft. Additionally, 95 companies included in the Fortune 100 operate general aviation aircraft. According to NBAA analysis in 2002, specific financial advantages were identified for companies operating business aircraft over non-operating firms. Businesses that operated aircraft consistently outperformed non-operators in key economic

performance measures, such as annual sales volume, number of employees, value of assets, stockholder's equity, and annual income. The study concluded the following:

- There were almost three times as many aircraft-operating companies than non-operators among the Fortune 500.
- Sales of all Fortune 500 aircraft operators were \$6.5 trillion, while sales of non-operators totaled approximately \$1.0 trillion.
- The net income of all operators was more than \$187 billion in 2000, while the total income of non-operators in the same year was \$19 billion.
- Operators collectively had over \$16 trillion in assets, whereas the assets of non-operators totaled \$2.5 trillion.
- Net income per employee for operating companies was more than \$9,000, whereas net income per employee was \$5,800 for non-operating companies.
- Stockholder equity in operating companies was over \$2.8 trillion; stockholder equity in non-operators was approximately \$314 billion.

The aviation activities supported by Utah's airports are essential to the state's economic vitality.

Business use of general aviation aircraft can range from the rental of small single-engine aircraft to multiple aircraft corporate fleets that are supported by dedicated flight crews and mechanics. The use of general aviation aircraft allows employers to efficiently transport priority personnel and cargo. Businesses use general aviation aircraft to link multiple office locations and to reach existing and potential customers. The use of business aircraft by smaller companies has escalated as fractional ownership, various chartering, leasing, time-sharing, and interchange agreements, partnerships, and management contracts have emerged. NBAA statistics support this claim by indicating that the number of flight departments among all the nation's businesses increased from 6,584 in 1991 to 10,191 in 2002, an increase of approximately 55 percent. Fractional ownership arrangements have also experienced rapid growth recently. In 2000, NBAA estimated that 3,834 companies and individuals held fractional ownership shares; by 2002, that number had

THE BUSINESS USE OF UTAH'S AIRPORTS

grown to 5,827, representing a growth of over 52 percent in two years.

According to the NBAA, the flexibility of a company to use general aviation airports that are located closer to one's final destination, as opposed to using highly congested commercial service airports, is a vital part of the utility of general aviation aircraft. In fact, many business aircraft operators prefer to use reliever airports in major metropolitan areas instead of airline hubs. For example, Salt Lake City's main reliever airports at Ogden-Hinckley and Salt Lake Municipal II combine for more based aircraft than Salt Lake City International (542 vs. 425 at SLC), even though they are not as convenient to downtown Salt Lake City. Bountiful SkyPark, Heber Valley, and Provo Municipal combine for almost 400 more based aircraft. Many of the most popular U.S. airports (in terms of general aviation itinerant operations) have little or no commercial airline service available.

Businesses typically choose to use general aviation because it provides safe, efficient, flexible, and reliable transportation. Of all the benefits provided to businesses by general aviation, flexibility is the highest ranked factor by all companies that use general aviation aircraft. The NBAA reports that, while there are many reasons that businesses use general aviation in their daily operation, the top ten are as follows:

- Flexibility
- Time savings
- Reliability
- Safety
- Improved marketing efficiency
- Facility/Branch office control
- Personnel development training
- Privacy and comfort
- Efficiency
- Security

One additional benefit that is becoming increasingly important to both employers and employees using general aviation aircraft for business travel is that it minimizes the number of non-business hours away from home. Using business aircraft increases the flexibility of scheduling and provides rapid, safe, and efficient access to meeting locations. These factors allow employees using general aviation aircraft to travel to and from their destination in less time than would be required by a traditional commercial service airline schedule. The

impact that minimizing non-business time away from home has on employee morale and productivity is immeasurable, yet increasingly important.

Survey of Utah Businesses

Approximately 3,000 businesses throughout Utah were surveyed to determine their dependence on aviation. The businesses included in the survey were randomly selected from a pool of businesses in the manufacturing, transportation, telecommunications, engineering/consulting, and utility sectors. The sectors targeted for this analysis represent those industries with a propensity to use general aviation.

According to the survey results, many Utah businesses depend on the airport system on a daily basis. In general, many businesses indicated that without access to general aviation, they would be forced to reduce employment or possibly relocate to an area with adequate access. Approximately six percent of all survey respondents indicated that their company owns, leases, or charters general aviation aircraft, and roughly 73 percent stated that their employees use scheduled airline service to conduct business. Approximately 75 percent of surveyed businesses indicated clients or vendors use scheduled airline service to visit their Utah operation. Additionally, approximately 24 percent of all respondents stated that they have customers or suppliers who use private general aviation aircraft to visit their Utah operations.

Each surveyed business was asked to provide information pertaining to its reliance on both general aviation and commercial air service for employment and sales. Due to the number and variety of surveyed businesses, it was impossible to determine precisely the value-added benefits derived from the use of the airport system. However, it was possible to estimate the importance of aviation to non-aviation businesses included in specific economic sectors.

Non-aviation business respondents were asked to estimate the percentage of their Utah business activity dependent on the availability of general aviation and commercial air service. Surveyed employers estimated that approximately 16 percent of their business is somewhat dependent on general aviation services and over 25 percent of gross sales are influenced by the presence of commercial air service.

Businesses typically choose to use general aviation because it provides safe, efficient, flexible, and reliable transportation.



UTAH AIRPORTS ECONOMIC IMPACT STUDY

This particular survey focused on the types of businesses that are likely to use aviation services; thus, businesses designated with the following classifications:

- Manufacturing
- Transportation, Communications & Utilities
- Wholesale Trade
- Finance, Insurance & Real Estate
- Engineering, Architecture & Accounting

The business survey concluded with asking respondents, if they were to consider relocating or expanding, to rank the importance of various factors. Overall, the availability of a commercial service airport ranked eighth in importance, while proximity to general aviation facilities ranked 14th. Convenient highway access, available labor supply, and availability of a trained workforce ranked first, second, and third, respectively. A sample of locational factors and their rank are as follows:

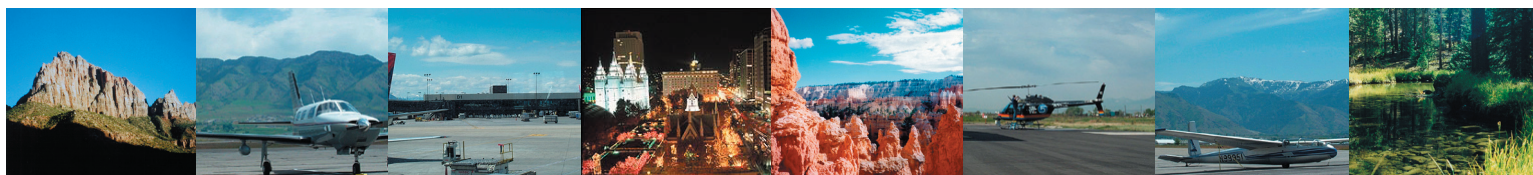
- Convenient highway access
- Cost of utilities
- Trained labor force
- Tax incentives
- Cost of living
- Proximity of product markets
- Proximity of input suppliers
- Location of commercial service airport
- Close to urban business district
- Close to cultural centers
- Location of raw materials
- Nearby natural resources
- Historic location of business
- Location of general aviation airport
- Availability of rail transportation

The following is a summary of the overall results of the business survey:

- Approximately six percent of the survey respondents indicated that they own, lease, or charter general aviation aircraft to support their business activities.
- Approximately 73 percent of the responding businesses indicated that their employees rely on commercial airline service to conduct business.
- Approximately 25 percent of the responding businesses indicated that they have customers or suppliers who rely on commercial airline service when conducting business with their company.
- Over 78 percent of the survey respondents indicated that they use air cargo/package express for transmitting business materials.

- Over 52,000 employees were represented in respondent business surveys.
- Overall, the responding companies estimated that approximately 16 percent of their Utah business activities depend on general aviation, and approximately 25 percent of their business activities depend on commercial air service.





Conclusions

Conclusions

Utah's system of public-use airports, ranging in size and complexity from domestic airline hubs to small, privately-owned turf strips, represents a major industry in the state. Some of these airports are commonly overlooked by the general public; however, when the economic benefits of the Utah system are considered, it becomes evident that each airport contributes to the state's economy and way of life. This analysis presents the benefits to Utah's economy that are attributable to system airports and their associated activities.

This economic impact study identified the employment, payroll, and economic output activity as a result of aviation in Utah. A series of survey efforts were conducted to gather information related to the economic activities of airport operators, tenants, users, and visitors. The data was then analyzed in an input-output model that measured the extent of the benefits of on-airport businesses and general aviation visitors to the Utah economy.

The sum of the direct and secondary impacts associated with aviation activity at Utah airports is considerably larger than many other industries in the state. In 2003, airports and aviation-related businesses in Utah supported approximately 105,250 full-time positions and were responsible for more than \$2.8 billion in payroll. Overall, it is estimated that aviation activity produced over \$5.6 billion in total economic activity, or output, in Utah. See **Table 21, Total Economic Impacts of Utah's Airports**.

From the tiny backcountry strip at Bluff to the world's 22nd busiest airport at Salt Lake City International, all of Utah's airports create jobs, income, and output for Utah's citizens and economy. **Table 19, Total Impacts of Commercial Service**, summarizes the total impacts of the state's six commercial service airports. **Table 20, Total Impacts of General Aviation**, shows the same information for the state's system of 47 general aviation airports. Table 21 shows the combined total statewide impact of aviation.

Table 19
Total Impacts of Commercial Service
2003

ASSOCIATED CITY	AIRPORT NAME	TOTAL COMMERCIAL SERVICE EMPLOYMENT	TOTAL COMMERCIAL SERVICE PAYROLL	TOTAL COMMERCIAL SERVICE OUTPUT
Bryce Canyon	Bryce Canyon	5.5	\$115,400	\$197,000
Cedar City	Cedar City Regional	182.0	\$4,462,500	\$6,560,000
Moab	Canyonlands Field	41.5	\$1,064,500	\$1,294,400
St. George	Saint George Municipal	710.0	\$17,668,500	\$22,743,200
Salt Lake City	Salt Lake City International	96,111.5	\$2,547,455,200	\$4,836,364,100
Vernal	Vernal	47.0	\$1,149,000	\$1,436,100
Commercial Service Airports Total		97,097.5	\$2,571,915,100	\$4,868,594,800

CONCLUSIONS

Table 20
Total Impacts of General Aviation
2003

ASSOCIATED CITY	AIRPORT NAME	TOTAL GENERAL AVIATION EMPLOYMENT	TOTAL GENERAL AVIATION PAYROLL	TOTAL GENERAL AVIATION OUTPUT
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	28.5	\$719,300	\$2,133,000
Cedar City	Cedar City Regional	154.5	\$5,248,700	\$16,288,600
Moab	Canyonlands Field	81.0	\$2,059,100	\$4,644,200
St. George	Saint George Municipal	110.5	\$2,664,400	\$5,641,500
Salt Lake City	Salt Lake City International	5,145.5	\$151,290,900	\$508,398,300
Vernal	Vernal - Uintah County	64.0	\$1,480,400	\$4,140,100
Commercial Service Airports Total		5,584.0	\$163,462,800	\$541,245,700
General Aviation Airports				
Beaver	Beaver Municipal	5.0	\$122,000	\$204,200
Blanding	Blanding Municipal	133.0	\$3,313,700	\$12,521,100
Bluff	Bluff	0.5	\$17,400	\$158,200
Bountiful	Bountiful Skypark	258.5	\$6,383,000	\$15,419,600
Brigham City	Brigham Municipal	91.0	\$2,417,700	\$8,889,000
Delta	Delta Municipal	12.5	\$294,000	\$769,900
Duchesne	Duchesne Municipal	4.0	\$70,500	\$481,600
Dutch John	Dutch John	1.5	\$34,900	\$116,600
Escalante	Escalante Municipal	4.0	\$98,400	\$306,700
Fillmore	Fillmore	6.0	\$125,900	\$237,400
Glen Canyon	Bullfrog Basin	22.5	\$557,700	\$794,800
Green River	Green River Municipal	20.5	\$485,900	\$1,183,400
Halls Crossing	Cal Black Memorial	11.5	\$259,900	\$812,200
Hanksville	Hanksville	3.5	\$81,000	\$200,400
Heber City	Heber City Municipal	112.0	\$2,520,000	\$,237,300
Huntington	Huntington Municipal	13.5	\$284,700	\$1,951,600
Hurricane	Hurricane	46.0	\$939,600	\$2,736,900
Junction	Junction	1.0	\$28,700	\$107,800
Kanab	Kanab Municipal	37.5	\$912,400	\$6,623,200
Loa	Wayne Wonderland	5.5	\$124,000	\$421,700
Logan	Logan - Cache	226.0	\$5,704,900	\$16,100,800
Manila	Manila	2.0	\$46,200	\$150,900
Manti	Manti - Ephraim	4.0	\$98,400	\$1,057,700
Milford	Milford Municipal	13.0	\$306,000	\$595,100
Monticello	Monticello	16.0	\$393,600	\$696,500
Monument Valley	Monument Valley	8.5	\$168,100	\$250,400
Morgan	Morgan County	37.0	\$1,000,300	\$1,877,400
Mount Pleasant	Mount Pleasant	2.0	\$46,200	\$309,900
Nephi	Nephi Municipal	17.5	\$537,400	\$2,919,500
Ogden	Ogden - Hinckley	272.5	\$8,158,700	\$59,327,200
Panguitch	Panguitch Municipal	4.0	\$98,400	\$423,600
Parowan	Parowan	34.0	\$796,100	\$3,620,700
Price	Carbon County	49.5	\$1,217,900	\$3,976,100
Provo	Provo Municipal	494.0	\$11,751,300	\$28,496,400
Richfield	Richfield Municipal	35.5	\$967,600	\$3,501,400
Roosevelt	Roosevelt Municipal	14.5	\$320,400	\$1,003,600
Salina	Salina - Gunnison	4.0	\$98,400	\$165,700
Salt Lake City	Salt Lake City Municipal II	1220.0	\$36,330,500	\$54,375,900
Spanish Fork	Spanish Fork - Springville	336.0	\$7,219,900	\$25,157,400
Tooele	Bolinder Field - Tooele Valley	49.0	\$1,169,900	\$4,807,900
Wendover	Wendover	44.0	\$1,169,200	\$3,293,100
General Aviation Airports Total		3672.5	\$96,670,800	\$274,280,800
Total		9,256.5	\$260,133,600	\$815,526,500



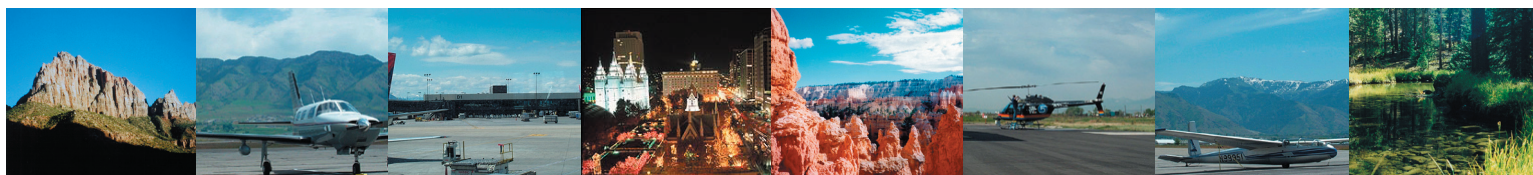
UTAH AIRPORTS ECONOMIC IMPACT STUDY

Table 21
Total Economic Impacts of Utah's Airports
2003

ASSOCIATED CITY	AIRPORT NAME	TOTAL EMPLOYMENT	TOTAL PAYROLL	TOTAL OUTPUT
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	34.0	\$858,700.00	\$2,133,000
Cedar City	Cedar City Regional	336.5	\$9,711,200	\$22,848,600
Moab	Canyonlands Field	122.5	\$3,123,600	\$5,938,600
St. George	Saint George Municipal	821.0	\$20,332,900	\$28,384,700
Salt Lake City	Salt Lake City International	101,257.0	\$2,698,746,100	\$5,344,762,400
Vernal	Vernal - Uintah County	111.0	\$2,629,400	\$5,576,200
Commercial Service Airports Total		102,682.0	\$2,735,401,900	\$5,409,643,500
General Aviation Airports				
Beaver	Beaver Municipal	5.0	\$122,000	\$204,200
Blanding	Blanding Municipal	133.0	\$3,313,700	\$12,521,100
Bluff	Bluff	0.5	\$17,400	\$158,200
Bountiful	Bountiful Skypark	258.5	\$6,383,000	\$15,419,600
Brigham City	Brigham Municipal	91.0	\$2,417,700	\$8,889,000
Delta	Delta Municipal	12.5	\$294,000	\$769,900
Duchesne	Duchesne Municipal	4.0	\$70,500	\$481,600
Dutch John	Dutch John	1.5	\$34,900	\$116,600
Escalante	Escalante Municipal	4.0	\$98,400	\$306,700
Fillmore	Fillmore	6.0	\$125,900	\$237,400
Glen Canyon	Bullfrog Basin	22.5	\$557,700	\$794,800
Green River	Green River Municipal	20.5	\$485,900	\$1,183,400
Halls Crossing	Cal Black Memorial	11.5	\$259,900	\$812,200
Hanksville	Hanksville	3.5	\$81,000	\$200,400
Heber City	Heber City Municipal	112.0	\$2,520,000	\$8,237,300
Huntington	Huntington Municipal	13.5	\$284,700	\$1,951,600
Hurricane	Hurricane	46.0	\$939,600	\$2,736,900
Junction	Junction	1.0	\$28,700	\$107,800
Kanab	Kanab Municipal	37.5	\$912,400	\$6,623,200
Loa	Wayne Wonderland	5.5	\$124,000	\$421,700
Logan	Logan - Cache	226.0	\$5,704,900	\$16,100,800
Manila	Manila	2.0	\$46,200	\$150,900
Manti	Manti - Ephraim	4.0	\$98,400	\$1,057,700
Milford	Milford Municipal	13.0	\$306,000	\$595,100
Monticello	Monticello	16.0	\$393,600	\$696,500
Monument Valley	Monument Valley	8.5	\$168,100	\$250,400
Morgan	Morgan County	37.0	\$1,000,300	\$1,877,400
Mount Pleasant	Mount Pleasant	2.0	\$46,200	\$309,900
Nephi	Nephi Municipal	17.5	\$537,400	\$2,919,500
Ogden	Ogden - Hinckley	272.5	\$8,158,700	\$59,327,200
Panguitch	Panguitch Municipal	4.0	\$98,400	\$423,600
Parowan	Parowan	34.0	\$796,100	\$3,620,700
Price	Carbon County	49.5	\$1,217,900	\$3,976,100
Provo	Provo Municipal	494.0	\$11,751,300	\$28,496,400
Richfield	Richfield Municipal	35.5	\$967,600	\$3,501,400
Roosevelt	Roosevelt Municipal	14.5	\$320,400	\$1,003,600
Salina	Salina - Gunnison	4.0	\$98,400	\$165,700
Salt Lake City	Salt Lake City Municipal II	1,220.0	\$36,330,500	\$54,375,900
Spanish Fork	Spanish Fork - Springville	336.0	\$7,219,900	\$25,157,400
Tooele	Bolinder Field - Tooele Valley	49.0	\$1,169,900	\$4,807,900
Wendover	Wendover	44.0	\$1,169,200	\$3,293,100
General Aviation Airports Total		3,672.5	\$96,670,800	\$274,280,800
Total Impact of Aviation in Utah		106,354.5	\$2,832,072,700	\$5,683,924,300



UTAH AIRPORTS ECONOMIC IMPACT STUDY



Appendix

Table A-1
General Aviation Activity
2003

ASSOCIATED CITY	AIRPORT NAME	ESTIMATED GA OPERATIONS	% ITINERANT	ESTIMATED ITINERANT GA OPERATIONS	ESTIMATED TRUE TRANSIENT ARRIVALS
Commercial Service Airports					
Bryce Canyon	Bryce Canyon	6,600	95.5%	6,300	1,040
Cedar City	Cedar City Regional	35,490	37.5%	13,320	2,200
Moab	Canyonlands Field	19,820	94.7%	18,770	3,100
St. George	Saint George Municipal	41,950	55.9%	23,470	3,870
Salt Lake City	Salt Lake City International	79,260	87.0%	68,960	11,380
Vernal	Vernal - Uintah County	17,180	79.3%	13,620	2,250
Commercial Service Airports Total		200,300	69.0%	138,140	23,840
General Aviation Airports					
Beaver	Beaver Municipal	1,600	95.0%	1,520	250
Blanding	Blanding Municipal	4,500	95.1%	4,280	710
Bluff	Bluff	250	96.0%	240	40
Bountiful	Bountiful Skypark	51,740	84.0%	43,460	7,170
Brigham City	Brigham Municipal	39,500	45.0%	17,775	2,930
Delta	Delta Municipal	5,500	57.1%	3,140	520
Duchesne	Duchesne Municipal	1,550	60.0%	930	150
Dutch John	Dutch John	500	100.0%	500	80
Escalante	Escalante Municipal	1,600	68.8%	1,100	180
Fillmore	Fillmore	1,600	95.0%	1,520	250
Glen Canyon	Bullfrog Basin	6,750	100.0%	6,750	1,110
Green River	Green River Municipal	5,500	95.1%	5,230	860
Halls Crossing	Cal Black Memorial	2,770	94.9%	2,630	430
Hanksville	Hanksville	800	100.0%	800	130
Heber City	Heber City Municipal	38,090	53.4%	20,340	3,360
Huntington	Huntington Municipal	3,800	40.0%	1,520	250
Hurricane	Hurricane	11,000	80.0%	8,800	1,450
Junction	Junction	300	100.0%	300	50
Kanab	Kanab Municipal	10,250	85.0%	8,710	1,440
Loa	Wayne Wonderland	1,800	85.0%	1,530	250
Logan	Logan - Cache	137,900	30.5%	42,000	6,930
Manila	Manila	500	100.0%	500	80
Manti	Manti - Ephraim	1,100	95.5%	1,050	170
Milford	Milford Municipal	5,800	50.0%	2,900	480
Monticello	Monticello	4,400	95.0%	4,180	690
Monument Valley	Monument Valley	2,760	100.0%	2,760	1,500
Morgan	Morgan County	10,000	55.0%	5,500	910
Mount Pleasant	Mount Pleasant	5,000	10.0%	500	80
Nephi	Nephi Municipal	5,800	60.3%	3,500	580
Ogden	Ogden - Hinckley	83,350	43.7%	36,400	6,010
Panguitch	Panguitch Municipal	1,150	90.0%	1,035	170
Parowan	Parowan	17,000	28.0%	4,760	790
Price	Carbon County	14,550	78.8%	11,460	1,890
Provo	Provo Municipal	165,700	45.2%	74,900	12,360
Richfield	Richfield Municipal	6,500	93.8%	6,100	1,010
Roosevelt	Roosevelt Municipal	4,700	69.8%	3,280	540
Salina	Salina - Gunnison	1,000	97.0%	970	160
Salt Lake City	Salt Lake City Municipal II	157,000	95.0%	149,150	24,610
Spanish Fork	Spanish Fork - Springville	35,000	25.0%	8,750	1,440
Tooele	Bolinder Field - Tooele Valley	37,100	26.0%	9,650	1,590
Wendover	Wendover	9,800	95.0%	9,310	1,540
General Aviation Airports Total		895,510	56.9%	509,730	85,140
Total		1,095,810	59.1%	647,870	108,980

APPENDIX

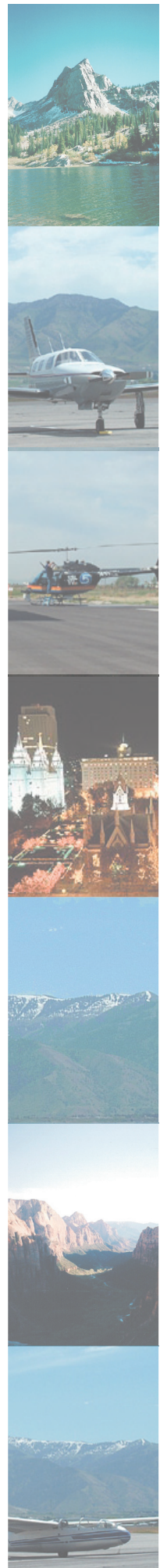
Table A-2
General Aviation Activity and Visitor Spending
2003

ASSOCIATED CITY	AIRPORT NAME	ESTIMATED TRUE TRANSIENT ARRIVALS	ESTIMATED GENERAL AVIATION VISITORS	TOTAL ANNUAL NUMBER OF DAYS STAYED	ANNUAL GENERAL AVIATION VISITOR EXPENDITURES
Commercial Service Airports					
Bryce Canyon	Bryce Canyon	1,040	3,020	6,340	\$418,400
Cedar City	Cedar City Regional	2,200	6,380	13,400	\$884,400
Moab	Canyonlands Field	3,100	8,990	18,880	\$1,246,100
St. George	Saint George Municipal	3,870	11,220	23,560	\$1,555,000
Salt Lake City	Salt Lake City International	11,380	45,520	95,590	\$6,308,900
Vernal	Vernal - Uintah County	2,250	6,530	13,710	\$904,900
Commercial Service Airports Total		23,840	81,660	171,480	\$11,317,700
General Aviation Airports					
Beaver	Beaver Municipal	250	730	1,530	\$101,000
Blanding	Blanding Municipal	710	2,060	4,330	\$285,800
Bluff	Bluff	40	120	250	\$16,500
Bountiful	Bountiful Skypark	7,170	20,790	43,660	\$2,881,600
Brigham City	Brigham Municipal	2,930	8,500	17,850	\$1,178,100
Delta	Delta Municipal	520	1,510	3,170	\$209,200
Duchesne	Duchesne Municipal	150	440	920	\$60,700
Dutch John	Dutch John	80	230	480	\$31,700
Escalante	Escalante Municipal	180	520	1,090	\$71,900
Fillmore	Fillmore	250	730	1,530	\$101,000
Glen Canyon	Bullfrog Basin	1,110	3,220	6,760	\$446,200
Green River	Green River Municipal	860	2,490	5,230	\$345,200
Halls Crossing	Cal Black Memorial	430	1,250	2,630	\$173,600
Hanksville	Hanksville	130	380	800	\$52,800
Heber City	Heber City Municipal	3,360	9,740	20,450	\$1,349,700
Huntington	Huntington Municipal	250	730	1,530	\$101,000
Hurricane	Hurricane	1,450	4,210	8,840	\$583,400
Junction	Junction	50	150	320	\$21,100
Kanab	Kanab Municipal	1,440	4,180	8,780	\$579,500
Loa	Wayne Wonderland	250	730	1,530	\$101,000
Logan	Logan - Cache	6,930	20,100	42,210	\$2,785,900
Manila	Manila	80	230	480	\$31,700
Manti	Manti - Ephraim	170	490	1,030	\$68,000
Milford	Milford Municipal	480	1,390	2,920	\$192,700
Monticello	Monticello	690	2,000	4,200	\$277,200
Monument Valley	Monument Valley	1,500	8,000	4,000	\$120,000
Morgan	Morgan County	910	2,640	5,540	\$365,600
Mount Pleasant	Mount Pleasant	80	230	480	\$31,700
Nephi	Nephi Municipal	580	1,680	3,530	\$233,000
Ogden	Ogden - Hinckley	6,010	17,430	36,600	\$2,415,600
Panguitch	Panguitch Municipal	170	490	1,030	\$68,000
Parowan	Parowan	790	2,290	4,810	\$317,500
Price	Carbon County	1,890	5,480	11,510	\$759,700
Provo	Provo Municipal	12,360	35,840	75,260	\$4,967,200
Richfield	Richfield Municipal	1,010	2,930	6,150	\$405,900
Roosevelt	Roosevelt Municipal	540	1,570	3,300	\$217,800
Salina	Salina - Gunnison	160	460	970	\$64,000
Salt Lake City	Salt Lake City Municipal II	24,610	71,370	149,880	\$9,892,100
Spanish Fork	Spanish Fork - Springville	1,440	4,180	8,780	\$579,500
Tooele	Bolinder Field - Tooele Valley	1,590	4,610	9,680	\$638,900
Wendover	Wendover	1,540	4,470	9,390	\$619,700
General Aviation Airports Total		85,140	250,590	513,430	\$33,742,700
Total		108,980	332,250	684,910	\$45,060,400

UTAH AIRPORTS ECONOMIC IMPACT STUDY

Table A-3
General Aviation Tenant Employment
2003

ASSOCIATED CITY	AIRPORT NAME	DIRECT GENERAL AVIATION TENANT EMPLOYMENT	SECONDARY GENERAL AVIATION TENANT EMPLOYMENT	TOTAL GENERAL AVIATION TENANT EMPLOYMENT
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	4.0	3.5	7.5
Cedar City	Cedar City Regional	59.0	51.0	110.0
Moab	Canyonlands Field	10.0	9.0	19.0
St. George	Saint George Municipal	17.5	15.5	33.0
Salt Lake City	Salt Lake City International	2,585.0	2,245.0	4,830.0
Vernal	Vernal - Uintah County	10.0	9.0	19.0
Commercial Service Airports Total		2,685.5	2,333.0	5,018.5
General Aviation Airports				
Beaver	Beaver Municipal	0.0	0.0	0.0
Blanding	Blanding Municipal	62.5	56.5	119.0
Bluff	Bluff	0.0	0.0	0.0
Bountiful	Bountiful Skypark	60.0	54.5	114.5
Brigham City	Brigham Municipal	16.5	15.0	31.5
Delta	Delta Municipal	1.0	1.0	2.0
Duchesne	Duchesne Municipal	0.5	0.5	1.0
Dutch John	Dutch John	0.0	0.0	0.0
Escalante	Escalante Municipal	0.5	0.0	0.5
Fillmore	Fillmore	0.5	0.5	1.0
Glen Canyon	Bullfrog Basin	0.0	0.0	0.0
Green River	Green River Municipal	2.0	1.5	3.5
Halls Crossing	Cal Black Memorial	1.5	1.5	3.0
Hanksville	Hanksville	0.5	0.0	0.5
Heber City	Heber City Municipal	23.5	21.0	44.5
Huntington	Huntington Municipal	4.5	4.0	8.5
Hurricane	Hurricane	9.0	8.0	17.0
Junction	Junction	0.5	0.0	0.5
Kanab	Kanab Municipal	4.5	4.0	8.5
Loa	Wayne Wonderland	0.5	0.0	0.5
Logan	Logan - Cache	45.5	41.0	86.5
Manila	Manila	0.5	0.0	0.5
Manti	Manti - Ephraim	0.5	0.0	0.5
Milford	Milford Municipal	1.5	1.5	3.0
Monticello	Monticello	1.0	1.0	2.0
Monument Valley	Monument Valley	1.0	1.0	2.0
Morgan	Morgan County	10.0	8.5	18.5
Mount Pleasant	Mount Pleasant	0.5	0.0	0.5
Nephi	Nephi Municipal	3.0	2.5	5.5
Ogden	Ogden - Hinckley	83.0	69.0	152.0
Panguitch	Panguitch Municipal	0.5	0.0	0.5
Parowan	Parowan	9.5	8.5	18.0
Price	Carbon County	6.0	5.5	11.5
Provo	Provo Municipal	129.0	116.5	245.5
Richfield	Richfield Municipal	8.0	7.0	15.0
Roosevelt	Roosevelt Municipal	2.0	2.0	4.0
Salina	Salina - Gunnison	0.5	0.0	0.5
Salt Lake City	Salt Lake City Municipal II	392.0	332.5	724.5
Spanish Fork	Spanish Fork - Springville	164.0	143.0	307.0
Tooele	Bolinder Field - Tooele Valley	9.0	8.0	17.0
Wendover	Wendover	7.0	6.0	13.0
General Aviation Airports Total		1,062.0	921.5	1,983.5
Total		3,747.5	3,254.5	7,002.0



APPENDIX

Table A-4
Commercial Service Tenant Employment
2003

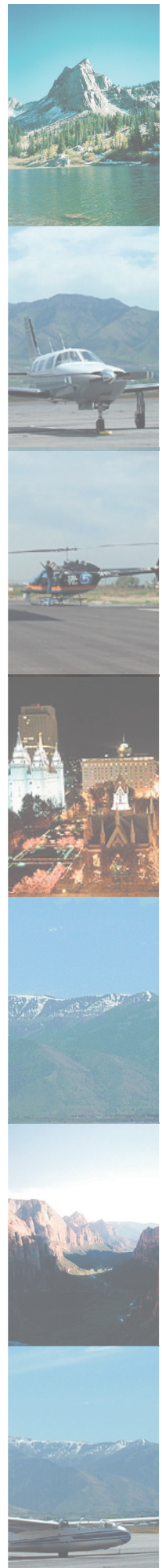
ASSOCIATED CITY	AIRPORT NAME	DIRECT COMMERCIAL SERVICE TENANT EMPLOYMENT	SECONDARY COMMERCIAL SERVICE TENANT EMPLOYMENT	TOTAL COMMERCIAL SERVICE TENANT EMPLOYMENT
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	0.0	0.0	0.0
Cedar City	Cedar City Regional	24.0	19.5	43.5
Moab	Canyonlands Field	10.5	8.5	19.0
St. George	Saint George Municipal	49.0	40.0	89.0
Salt Lake City	Salt Lake City International	10,891.0	8,932.5	19,823.5
Vernal	Vernal - Uintah County	8.0	6.5	14.5
Commercial Service Airports Total		10,982.5	9,007.0	19,989.5



UTAH AIRPORTS ECONOMIC IMPACT STUDY

Table A-5
General Aviation Visitor Employment
2003

ASSOCIATED CITY	AIRPORT NAME	DIRECT GENERAL AVIATION VISITOR EMPLOYMENT	SECONDARY GENERAL AVIATION VISITOR EMPLOYMENT	TOTAL GENERAL AVIATION VISITOR EMPLOYMENT
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	15.0	6.0	21.0
Cedar City	Cedar City Regional	31.5	13.0	44.5
Moab	Canyonlands Field	44.0	18.0	62.0
St. George	Saint George Municipal	55.0	22.5	77.5
Salt Lake City	Salt Lake City International	223.5	92.0	315.5
Vernal	Vernal - Uintah County	32.0	13.0	45.0
Commercial Service Airports Total		401.0	164.5	565.5
General Aviation Airports				
Beaver	Beaver Municipal	3.5	1.5	5.0
Blanding	Blanding Municipal	10.0	4.0	14.0
Bluff	Bluff	0.5	0.0	0.5
Bountiful	Bountiful Skypark	102.0	42.0	144.0
Brigham City	Brigham Municipal	42.0	17.5	59.5
Delta	Delta Municipal	7.5	3.0	10.5
Duchesne	Duchesne Municipal	2.0	1.0	3.0
Dutch John	Dutch John	1.0	0.5	1.5
Escalante	Escalante Municipal	2.5	1.0	3.5
Fillmore	Fillmore	3.5	1.5	5.0
Glen Canyon	Bullfrog Basin	16.0	6.5	22.5
Green River	Green River Municipal	12.0	5.0	17.0
Halls Crossing	Cal Black Memorial	6.0	2.5	8.5
Hanksville	Hanksville	2.0	1.0	3.0
Heber City	Heber City Municipal	48.0	19.5	67.5
Huntington	Huntington Municipal	3.5	1.5	5.0
Hurricane	Hurricane	20.5	8.5	29.0
Junction	Junction	0.5	0.0	0.5
Kanab	Kanab Municipal	20.5	8.5	29.0
Loa	Wayne Wonderland	3.5	1.5	5.0
Logan	Logan - Cache	99.0	40.5	139.5
Manila	Manila	1.0	0.5	1.5
Manti	Manti - Ephraim	2.5	1.0	3.5
Milford	Milford Municipal	7.0	3.0	10.0
Monticello	Monticello	10.0	4.0	14.0
Monument Valley	Monument Valley	4.5	2.0	6.5
Morgan	Morgan County	13.0	5.5	18.5
Mount Pleasant	Mount Pleasant	1.0	0.5	1.5
Nephi	Nephi Municipal	8.5	3.5	12.0
Ogden	Ogden - Hinckley	85.5	35.0	120.5
Panguitch	Panguitch Municipal	2.5	1.0	3.5
Parowan	Parowan	11.5	4.5	16.0
Price	Carbon County	27.0	11.0	38.0
Provo	Provo Municipal	176.0	72.5	248.5
Richfield	Richfield Municipal	14.5	6.0	20.5
Roosevelt	Roosevelt Municipal	7.5	3.0	10.5
Salina	Salina - Gunnison	2.5	1.0	3.5
Salt Lake City	Salt Lake City Municipal II	351.0	144.5	495.5
Spanish Fork	Spanish Fork - Springville	20.5	8.5	29.0
Tooele	Bolinder Field - Tooele Valley	22.5	9.5	32.0
Wendover	Wendover	22.0	9.0	31.0
General Aviation Airports Total		1,196.5	492.5	1,689.0
Total		1,597.5	657.0	2,254.5



APPENDIX

Table A-6
Commercial Service Visitor Employment
2003

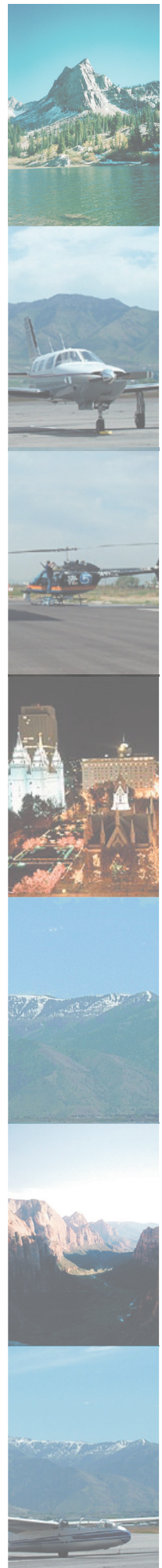
ASSOCIATED CITY	AIRPORT NAME	DIRECT COMMERCIAL SERVICE VISITOR EMPLOYMENT	SECONDARY COMMERCIAL SERVICE VISITOR EMPLOYMENT	TOTAL COMMERCIAL SERVICE VISITOR EMPLOYMENT
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	4.0	1.5	5.5
Cedar City	Cedar City Regional	98.0	40.5	138.5
Moab	Canyonlands Field	16.0	6.5	22.5
St. George	Saint George Municipal	440.0	181.0	621.0
Salt Lake City	Salt Lake City International	54,049.0	22,239.0	76,288.0
Vernal	Vernal - Uintah County	23.0	9.5	32.5
Commercial Service Airports Total		54,630.0	22,478.0	77,108.0



UTAH AIRPORTS ECONOMIC IMPACT STUDY

Table A-7
Total Aviation-Related Employment
2003

ASSOCIATED CITY	AIRPORT NAME	TOTAL DIRECT EMPLOYMENT	TOTAL SECONDARY EMPLOYMENT	COMBINED TOTAL EMPLOYMENT
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	23.0	11.0	34.0
Cedar City	Cedar City Regional	212.5	124.0	336.5
Moab	Canyonlands Field	80.5	42.0	122.5
St. George	Saint George Municipal	561.5	259.5	821.0
Salt Lake City	Salt Lake City International	67,748.5	33,508.5	101,257.0
Vernal	Vernal - Uintah County	73.0	38.0	111.0
Commercial Service Airports Total		68,699.0	33,983.0	102,682.0
General Aviation Airports				
Beaver	Beaver Municipal	3.5	1.5	5.0
Blanding	Blanding Municipal	72.5	60.5	133.0
Bluff	Bluff	0.5	0.0	0.5
Bountiful	Bountiful Skypark	162.0	96.5	258.5
Brigham City	Brigham Municipal	58.5	32.5	91.0
Delta	Delta Municipal	8.5	4.0	12.5
Duchesne	Duchesne Municipal	2.5	1.5	4.0
Dutch John	Dutch John	1.0	0.5	1.5
Escalante	Escalante Municipal	3.0	1.0	4.0
Fillmore	Fillmore	4.0	2.0	6.0
Glen Canyon	Bullfrog Basin	16.0	6.5	22.5
Green River	Green River Municipal	14.0	6.5	20.5
Halls Crossing	Cal Black Memorial	7.5	4.0	11.5
Hanksville	Hanksville	2.5	1.0	3.5
Heber City	Heber City Municipal	71.5	40.5	112.0
Huntington	Huntington Municipal	8.0	5.5	13.5
Hurricane	Hurricane	29.5	16.5	46.0
Junction	Junction	1.0	0.0	1.0
Kanab	Kanab Municipal	25.0	12.5	37.5
Loa	Wayne Wonderland	4.0	1.5	5.5
Logan	Logan - Cache	144.5	81.5	226.0
Manila	Manila	1.5	0.5	2.0
Manti	Manti - Ephraim	3.0	1.0	4.0
Milford	Milford Municipal	8.5	4.5	13.0
Monticello	Monticello	11.0	5.0	16.0
Monument Valley	Monument Valley	5.5	3.0	8.5
Morgan	Morgan County	23.0	14.0	37.0
Mount Pleasant	Mount Pleasant	1.5	0.5	2.0
Nephi	Nephi Municipal	11.5	6.0	17.5
Ogden	Ogden - Hinckley	168.5	104.0	272.5
Panguitch	Panguitch Municipal	3.0	1.0	4.0
Parowan	Parowan	21.0	13.0	34.0
Price	Carbon County	33.0	16.5	49.5
Provo	Provo Municipal	305.0	189.0	494.0
Richfield	Richfield Municipal	22.5	13.0	35.5
Roosevelt	Roosevelt Municipal	9.5	5.0	14.5
Salina	Salina - Gunnison	3.0	1.0	4.0
Salt Lake City	Salt Lake City Municipal II	743.0	477.0	1,220.0
Spanish Fork	Spanish Fork - Springville	184.5	151.5	336.0
Tooele	Bolinder Field - Tooele Valley	31.5	17.5	49.0
Wendover	Wendover	29.0	15.0	44.0
General Aviation Airports Total		2,258.5	1,414.0	3,672.5
Total		70,957.5	35,397.0	106,354.5



APPENDIX

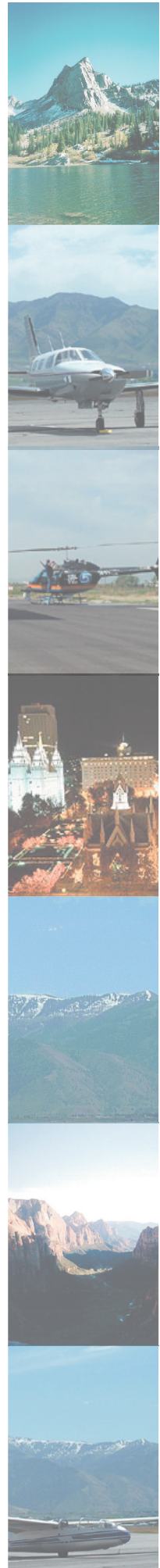
Table A-8
General Aviation Tenant Payroll
2003

ASSOCIATED CITY	AIRPORT NAME	DIRECT GENERAL AVIATION TENANT PAYROLL	SECONDARY GENERAL AVIATION TENANT PAYROLL	TOTAL GENERAL AVIATION TENANT PAYROLL
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	\$121,600	\$74,900	\$196,500
Cedar City	Cedar City Regional	\$2,557,900	\$1,592,900	\$4,150,800
Moab	Canyonlands Field	\$332,500	\$193,000	\$525,500
St. George	Saint George Municipal	\$468,500	\$279,000	\$747,500
Salt Lake City	Salt Lake City International	\$89,002,800	\$54,498,300	\$143,501,100
Vernal	Vernal - Uintah County	\$229,500	\$135,600	\$365,100
Commercial Service Airports Total		\$92,712,800	\$56,773,700	\$149,486,500
General Aviation Airports				
Beaver	Beaver Municipal	\$0	\$0	\$0
Blanding	Blanding Municipal	\$1,877,900	\$1,087,300	\$2,965,200
Bluff	Bluff	\$0	\$0	\$0
Bountiful	Bountiful Skypark	\$1,790,100	\$1,037,800	\$2,827,900
Brigham City	Brigham Municipal	\$603,100	\$350,800	\$953,900
Delta	Delta Municipal	\$20,000	\$12,600	\$32,600
Duchesne	Duchesne Municipal	\$500	\$300	\$800
Dutch John	Dutch John	\$0	\$0	\$0
Escalante	Escalante Municipal	\$6,900	\$4,400	\$11,300
Fillmore	Fillmore	\$2,400	\$1,500	\$3,900
Glen Canyon	Bullfrog Basin	\$0	\$0	\$0
Green River	Green River Municipal	\$41,500	\$26,200	\$67,700
Halls Crossing	Cal Black Memorial	\$31,100	\$19,700	\$50,800
Hanksville	Hanksville	\$6,900	\$4,400	\$11,300
Heber City	Heber City Municipal	\$536,000	\$311,000	\$847,000
Huntington	Huntington Municipal	\$103,000	\$59,700	\$162,700
Hurricane	Hurricane	\$142,100	\$83,000	\$225,100
Junction	Junction	\$6,900	\$4,400	\$11,300
Kanab	Kanab Municipal	\$124,400	\$73,500	\$197,900
Loa	Wayne Wonderland	\$1,200	\$800	\$2,000
Logan	Logan - Cache	\$1,427,100	\$827,300	\$2,254,400
Manila	Manila	\$6,900	\$4,400	\$11,300
Manti	Manti - Ephraim	\$6,900	\$4,400	\$11,300
Milford	Milford Municipal	\$38,000	\$24,000	\$62,000
Monticello	Monticello	\$27,600	\$17,500	\$45,100
Monument Valley	Monument Valley	\$6,900	\$4,400	\$11,300
Morgan	Morgan County	\$338,000	\$209,200	\$547,200
Mount Pleasant	Mount Pleasant	\$6,900	\$4,400	\$11,300
Nephi	Nephi Municipal	\$152,000	\$89,100	\$241,100
Ogden	Ogden - Hinckley	\$3,226,900	\$1,951,800	\$5,178,700
Panguitch	Panguitch Municipal	\$6,900	\$4,400	\$11,300
Parowan	Parowan	\$250,400	\$144,900	\$395,300
Price	Carbon County	\$174,000	\$102,900	\$276,900
Provo	Provo Municipal	\$3,552,900	\$2,064,200	\$5,617,100
Richfield	Richfield Municipal	\$287,100	\$175,100	\$462,200
Roosevelt	Roosevelt Municipal	\$37,100	\$21,900	\$59,000
Salina	Salina - Gunnison	\$6,900	\$4,400	\$11,300
Salt Lake City	Salt Lake City Municipal II	\$14,785,200	\$9,311,700	\$24,096,900
Spanish Fork	Spanish Fork - Springville	\$4,065,500	\$2,439,900	\$6,505,400
Tooele	Bolinder Field - Tooele Valley	\$238,800	\$146,900	\$385,700
Wendover	Wendover	\$247,200	\$155,200	\$402,400
General Aviation Airports Total		\$34,183,200	\$20,785,400	\$54,968,600
Total		\$126,896,000	\$77,559,100	\$204,455,100

UTAH AIRPORTS ECONOMIC IMPACT STUDY

Table A-9
Commercial Service Tenant Payroll
2003

ASSOCIATED CITY	AIRPORT NAME	DIRECT COMMERCIAL SERVICE TENANT PAYROLL	SECONDARY COMMERCIAL SERVICE TENANT PAYROLL	TOTAL COMMERCIAL SERVICE TENANT PAYROLL
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	\$0	\$0	\$0
Cedar City	Cedar City Regional	\$656,900	\$390,000	\$1,046,900
Moab	Canyonlands Field	\$318,000	\$188,800	\$506,800
St. George	Saint George Municipal	\$1,463,900	\$869,100	\$2,333,000
Salt Lake City	Salt Lake City International	\$416,420,800	\$247,238,700	\$663,659,500
Vernal	Vernal - Uintah County	\$218,000	\$129,400	\$347,400
Commercial Service Airports Total		\$419,077,600	\$248,816,000	\$667,893,600



APPENDIX

Table A-10
General Aviation Visitor Payroll
2003

ASSOCIATED CITY	AIRPORT NAME	DIRECT GENERAL AVIATION VISITOR PAYROLL	SECONDARY GENERAL AVIATION VISITOR PAYROLL	TOTAL GENERAL AVIATION VISITOR PAYROLL
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	\$309,000	\$213,800	\$522,800
Cedar City	Cedar City Regional	\$648,900	\$449,000	\$1,097,900
Moab	Canyonlands Field	\$906,400	\$627,200	\$1,533,600
St. George	Saint George Municipal	\$1,133,000	\$783,900	\$1,916,900
Salt Lake City	Salt Lake City International	\$4,604,100	\$3,185,700	\$7,789,800
Vernal	Vernal - Uintah County	\$659,200	\$456,100	\$1,115,300
Commercial Service Airports Total		\$8,260,600	\$5,715,700	\$13,976,300
General Aviation Airports				
Beaver	Beaver Municipal	\$72,100	\$49,900	\$122,000
Blanding	Blanding Municipal	\$206,000	\$142,500	\$348,500
Bluff	Bluff	\$10,300	\$7,100	\$17,400
Bountiful	Bountiful Skypark	\$2,101,200	\$1,453,900	\$3,555,100
Brigham City	Brigham Municipal	\$865,200	\$598,600	\$1,463,800
Delta	Delta Municipal	\$154,500	\$106,900	\$261,400
Duchesne	Duchesne Municipal	\$41,200	\$28,500	\$69,700
Dutch John	Dutch John	\$20,600	\$14,300	\$34,900
Escalante	Escalante Municipal	\$51,500	\$35,600	\$87,100
Fillmore	Fillmore	\$72,100	\$49,900	\$122,000
Glen Canyon	Bullfrog Basin	\$329,600	\$228,100	\$557,700
Green River	Green River Municipal	\$247,200	\$171,000	\$418,200
Halls Crossing	Cal Black Memorial	\$123,600	\$85,500	\$209,100
Hanksville	Hanksville	\$41,200	\$28,500	\$69,700
Heber City	Heber City Municipal	\$988,800	\$684,200	\$1,673,000
Huntington	Huntington Municipal	\$72,100	\$49,900	\$122,000
Hurricane	Hurricane	\$422,300	\$292,200	\$714,500
Junction	Junction	\$10,300	\$7,100	\$17,400
Kanab	Kanab Municipal	\$422,300	\$292,200	\$714,500
Loa	Wayne Wonderland	\$72,100	\$49,900	\$122,000
Logan	Logan - Cache	\$2,039,400	\$1,411,100	\$3,450,500
Manila	Manila	\$20,600	\$14,300	\$34,900
Manti	Manti - Ephraim	\$51,500	\$35,600	\$87,100
Milford	Milford Municipal	\$144,200	\$99,800	\$244,000
Monticello	Monticello	\$206,000	\$142,500	\$348,500
Monument Valley	Monument Valley	\$92,700	\$64,100	\$156,800
Morgan	Morgan County	\$267,800	\$185,300	\$453,100
Mount Pleasant	Mount Pleasant	\$20,600	\$14,300	\$34,900
Nephi	Nephi Municipal	\$175,100	\$121,200	\$296,300
Ogden	Ogden - Hinckley	\$1,761,300	\$1,218,700	\$2,980,000
Panguitch	Panguitch Municipal	\$51,500	\$35,600	\$87,100
Parowan	Parowan	\$236,900	\$163,900	\$400,800
Price	Carbon County	\$556,200	\$384,800	\$941,000
Provo	Provo Municipal	\$3,625,600	\$2,508,600	\$6,134,200
Richfield	Richfield Municipal	\$298,700	\$206,700	\$505,400
Roosevelt	Roosevelt Municipal	\$154,500	\$106,900	\$261,400
Salina	Salina - Gunnison	\$51,500	\$35,600	\$87,100
Salt Lake City	Salt Lake City Municipal II	\$7,230,600	\$5,003,000	\$12,233,600
Spanish Fork	Spanish Fork - Springville	\$422,300	\$292,200	\$714,500
Tooele	Bolinder Field - Tooele Valley	\$463,500	\$320,700	\$784,200
Wendover	Wendover	\$453,200	\$313,600	\$766,800
General Aviation Airports Total		\$24,647,900	\$17,054,300	\$41,702,200
Total		\$32,908,500	\$22,770,000	\$55,678,500

UTAH AIRPORTS ECONOMIC IMPACT STUDY

Table A-11
Commercial Service Visitor Payroll
2003

ASSOCIATED CITY	AIRPORT NAME	DIRECT COMMERCIAL SERVICE VISITOR PAYROLL	SECONDARY COMMERCIAL SERVICE VISITOR PAYROLL	TOTAL COMMERCIAL SERVICE VISITOR PAYROLL
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	\$82,400	\$33,000	\$115,400
Cedar City	Cedar City Regional	\$2,018,800	\$1,396,800	\$3,415,600
Moab	Canyonlands Field	\$329,600	\$228,100	\$557,700
St. George	Saint George Municipal	\$9,064,000	\$6,271,500	\$15,335,500
Salt Lake City	Salt Lake City International	\$1,113,409,400	\$770,386,300	\$1,883,795,700
Vernal	Vernal - Uintah County	\$473,800	\$327,800	\$801,600
Commercial Service Airports Total		\$1,125,378,000	\$778,643,500	\$1,904,021,500



APPENDIX

Table A-12
Total Aviation-Related Payroll
2003

ASSOCIATED CITY	AIRPORT NAME	TOTAL DIRECT PAYROLL	TOTAL SECONDARY PAYROLL	COMBINED TOTAL PAYROLL
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	\$513,000	\$345,700	\$858,700
Cedar City	Cedar City Regional	\$5,882,400	\$3,828,800	\$9,711,200
Moab	Canyonlands Field	\$1,886,500	\$1,237,100	\$3,123,600
St. George	Saint George Municipal	\$12,129,400	\$8,203,500	\$20,332,900
Salt Lake City	Salt Lake City International	\$1,623,437,100	\$1,075,309,000	\$2,698,746,100
Vernal	Vernal - Uintah County	\$1,580,500	\$1,048,900	\$2,629,400
Commercial Service Airports Total		\$1,645,428,900	\$1,089,973,000	\$2,735,401,900
General Aviation Airports				
Beaver	Beaver Municipal	\$72,100	\$49,900	\$122,000
Blanding	Blanding Municipal	\$2,083,900	\$1,229,800	\$3,313,700
Bluff	Bluff	\$10,300	\$7,100	\$17,400
Bountiful	Bountiful Skypark	\$3,891,300	\$2,491,700	\$6,383,000
Brigham City	Brigham Municipal	\$1,468,300	\$949,400	\$2,417,700
Delta	Delta Municipal	\$174,500	\$119,500	\$294,000
Duchesne	Duchesne Municipal	\$41,700	\$28,800	\$70,500
Dutch John	Dutch John	\$20,600	\$14,300	\$34,900
Escalante	Escalante Municipal	\$58,400	\$40,000	\$98,400
Fillmore	Fillmore	\$74,500	\$51,400	\$125,900
Glen Canyon	Bullfrog Basin	\$329,600	\$228,100	\$557,700
Green River	Green River Municipal	\$288,700	\$197,200	\$485,900
Halls Crossing	Cal Black Memorial	\$154,700	\$105,200	\$259,900
Hanksville	Hanksville	\$48,100	\$32,900	\$81,000
Heber City	Heber City Municipal	\$1,524,800	\$995,200	\$2,520,000
Huntington	Huntington Municipal	\$175,100	\$109,600	\$284,700
Hurricane	Hurricane	\$564,400	\$375,200	\$939,600
Junction	Junction	\$17,200	\$11,500	\$28,700
Kanab	Kanab Municipal	\$546,700	\$365,700	\$912,400
Loa	Wayne Wonderland	\$73,300	\$50,700	\$124,000
Logan	Logan - Cache	\$3,466,500	\$2,238,400	\$5,704,900
Manila	Manila	\$27,500	\$18,700	\$46,200
Manti	Manti - Ephraim	\$58,400	\$40,000	\$98,400
Milford	Milford Municipal	\$182,200	\$123,800	\$306,000
Monticello	Monticello	\$233,600	\$160,000	\$393,600
Monument Valley	Monument Valley	\$99,600	\$68,500	\$168,100
Morgan	Morgan County	\$605,800	\$394,500	\$1,000,300
Mount Pleasant	Mount Pleasant	\$27,500	\$18,700	\$46,200
Nephi	Nephi Municipal	\$327,100	\$210,300	\$537,400
Ogden	Ogden - Hinckley	\$4,988,200	\$3,170,500	\$8,158,700
Panguitch	Panguitch Municipal	\$58,400	\$40,000	\$98,400
Parowan	Parowan	\$487,300	\$308,800	\$796,100
Price	Carbon County	\$730,200	\$487,700	\$1,217,900
Provo	Provo Municipal	\$7,178,500	\$4,572,800	\$11,751,300
Richfield	Richfield Municipal	\$585,800	\$381,800	\$967,600
Roosevelt	Roosevelt Municipal	\$191,600	\$128,800	\$320,400
Salina	Salina - Gunnison	\$58,400	\$40,000	\$98,400
Salt Lake City	Salt Lake City Municipal II	\$22,015,800	\$14,314,700	\$36,330,500
Spanish Fork	Spanish Fork - Springville	\$4,487,800	\$2,732,100	\$7,219,900
Tooele	Bolinder Field - Tooele Valley	\$702,300	\$467,600	\$1,169,900
Wendover	Wendover	\$700,400	\$468,800	\$1,169,200
General Aviation Airports Total		\$58,831,100	\$37,839,700	\$96,670,800
Total		\$1,704,260,000	\$1,127,812,700	\$2,832,072,700

UTAH AIRPORTS ECONOMIC IMPACT STUDY

Table A-13
General Aviation Tenant Output
2003

ASSOCIATED CITY	AIRPORT NAME	DIRECT GENERAL AVIATION TENANT OUTPUT	SECONDARY GENERAL AVIATION TENANT OUTPUT	TOTAL GENERAL AVIATION TENANT OUTPUT
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	\$803,000	\$597,800	\$1,400,800
Cedar City	Cedar City Regional	\$8,516,300	\$6,224,700	\$14,741,000
Moab	Canyonlands Field	\$1,443,400	\$1,020,200	\$2,463,600
St. George	Saint George Municipal	\$1,723,100	\$1,197,300	\$2,920,400
Salt Lake City	Salt Lake City International	\$288,273,200	\$209,084,900	\$497,358,100
Vernal	Vernal - Uintah County	\$1,498,700	\$1,057,900	\$2,556,600
Commercial Service Airports Total		\$302,257,700	\$219,182,800	\$521,440,500
General Aviation Airports				
Beaver	Beaver Municipal	\$15,700	\$11,800	\$27,500
Blanding	Blanding Municipal	\$7,154,500	\$4,866,500	\$12,021,000
Bluff	Bluff	\$73,700	\$55,600	\$129,300
Bountiful	Bountiful Skypark	\$6,170,000	\$4,207,000	\$10,377,000
Brigham City	Brigham Municipal	\$3,942,900	\$2,884,500	\$6,827,400
Delta	Delta Municipal	\$230,000	\$173,800	\$403,800
Duchesne	Duchesne Municipal	\$213,800	\$161,600	\$375,400
Dutch John	Dutch John	\$34,800	\$26,300	\$61,100
Escalante	Escalante Municipal	\$103,000	\$77,900	\$180,900
Fillmore	Fillmore	\$34,600	\$26,100	\$60,700
Glen Canyon	Bullfrog Basin	\$8,000	\$6,000	\$14,000
Green River	Green River Municipal	\$330,000	\$249,300	\$579,300
Halls Crossing	Cal Black Memorial	\$289,600	\$218,800	\$508,400
Hanksville	Hanksville	\$61,500	\$46,500	\$108,000
Heber City	Heber City Municipal	\$3,458,900	\$2,416,500	\$5,875,400
Huntington	Huntington Municipal	\$1,049,900	\$725,000	\$1,774,900
Hurricane	Hurricane	\$1,011,200	\$704,800	\$1,716,000
Junction	Junction	\$40,400	\$30,500	\$70,900
Kanab	Kanab Municipal	\$3,211,000	\$2,398,100	\$5,609,100
Loa	Wayne Wonderland	\$139,500	\$105,500	\$245,000
Logan	Logan - Cache	\$6,607,900	\$4,617,800	\$11,225,700
Manila	Manila	\$54,300	\$41,100	\$95,400
Manti	Manti - Ephraim	\$534,700	\$404,000	\$938,700
Milford	Milford Municipal	\$146,900	\$111,000	\$257,900
Monticello	Monticello	\$120,400	\$91,000	\$211,400
Monument Valley	Monument Valley	\$23,000	\$17,400	\$40,400
Morgan	Morgan County	\$724,900	\$512,700	\$1,237,600
Mount Pleasant	Mount Pleasant	\$144,900	\$109,500	\$254,400
Nephi	Nephi Municipal	\$1,437,700	\$1,074,100	\$2,511,800
Ogden	Ogden - Hinckley	\$31,629,200	\$23,470,900	\$55,100,100
Panguitch	Panguitch Municipal	\$173,500	\$131,100	\$304,600
Parowan	Parowan	\$1,811,200	\$1,253,900	\$3,065,100
Price	Carbon County	\$1,527,500	\$1,119,200	\$2,646,700
Provo	Provo Municipal	\$11,717,300	\$8,086,800	\$19,804,100
Richfield	Richfield Municipal	\$1,639,500	\$1,151,600	\$2,791,100
Roosevelt	Roosevelt Municipal	\$362,000	\$260,500	\$622,500
Salina	Salina - Gunnison	\$30,600	\$23,100	\$53,700
Salt Lake City	Salt Lake City Municipal II	\$21,226,000	\$15,839,400	\$37,065,400
Spanish Fork	Spanish Fork - Springville	\$14,269,800	\$9,873,500	\$24,143,300
Tooele	Bolinder Field - Tooele Valley	\$2,110,500	\$1,579,400	\$3,689,900
Wendover	Wendover	\$1,260,000	\$948,700	\$2,208,700
General Aviation Airports Total		\$125,124,800	\$90,108,800	\$215,233,600
Total		\$427,382,500	\$309,291,600	\$736,674,100



APPENDIX

Table A-14
Commercial Service Tenant Output
2003

ASSOCIATED CITY	AIRPORT NAME	DIRECT COMMERCIAL SERVICE TENANT OUTPUT	SECONDARY COMMERCIAL SERVICE TENANT OUTPUT	TOTAL COMMERCIAL SERVICE TENANT OUTPUT
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	\$0	\$0	\$0
Cedar City	Cedar City Regional	\$1,003,800	\$705,400	\$1,709,200
Moab	Canyonlands Field	\$294,000	\$206,600	\$500,600
St. George	Saint George Municipal	\$614,800	\$432,100	\$1,046,900
Salt Lake City	Salt Lake City International	\$1,273,829,400	\$895,201,700	\$2,169,031,100
Vernal	Vernal - Uintah County	\$170,000	\$119,500	\$289,500
Commercial Service Airports Total		\$1,275,912,000	\$896,665,300	\$2,172,577,300



UTAH AIRPORTS ECONOMIC IMPACT STUDY

Table A-15
General Aviation Visitor Output
2003

ASSOCIATED CITY	AIRPORT NAME	DIRECT GENERAL AVIATION VISITOR OUTPUT	SECONDARY GENERAL AVIATION VISITOR OUTPUT	TOTAL GENERAL AVIATION VISITOR OUTPUT
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	\$418,400	\$313,800	\$732,200
Cedar City	Cedar City Regional	\$884,400	\$663,200	\$1,547,600
Moab	Canyonlands Field	\$1,246,100	\$934,500	\$2,180,600
St. George	Saint George Municipal	\$1,555,000	\$1,166,100	\$2,721,100
Salt Lake City	Salt Lake City International	\$6,308,900	\$4,731,300	\$11,040,200
Vernal	Vernal - Uintah County	\$904,900	\$678,600	\$1,583,500
Commercial Service Airports Total		\$11,317,700	\$8,487,500	\$19,805,200
General Aviation Airports				
Beaver	Beaver Municipal	\$101,000	\$75,700	\$176,700
Blanding	Blanding Municipal	\$285,800	\$214,300	\$500,100
Bluff	Bluff	\$16,500	\$12,400	\$28,900
Bountiful	Bountiful Skypark	\$2,881,600	\$2,161,000	\$5,042,600
Brigham City	Brigham Municipal	\$1,178,100	\$883,500	\$2,061,600
Delta	Delta Municipal	\$209,200	\$156,900	\$366,100
Duchesne	Duchesne Municipal	\$60,700	\$45,500	\$106,200
Dutch John	Dutch John	\$31,700	\$23,800	\$55,500
Escalante	Escalante Municipal	\$71,900	\$53,900	\$125,800
Fillmore	Fillmore	\$101,000	\$75,700	\$176,700
Glen Canyon	Bullfrog Basin	\$446,200	\$334,600	\$780,800
Green River	Green River Municipal	\$345,200	\$258,900	\$604,100
Halls Crossing	Cal Black Memorial	\$173,600	\$130,200	\$303,800
Hanksville	Hanksville	\$52,800	\$39,600	\$92,400
Heber City	Heber City Municipal	\$1,349,700	\$1,012,200	\$2,361,900
Huntington	Huntington Municipal	\$101,000	\$75,700	\$176,700
Hurricane	Hurricane	\$583,400	\$437,500	\$1,020,900
Junction	Junction	\$21,100	\$15,800	\$36,900
Kanab	Kanab Municipal	\$579,500	\$434,600	\$1,014,100
Loa	Wayne Wonderland	\$101,000	\$75,700	\$176,700
Logan	Logan - Cache	\$2,785,900	\$2,089,200	\$4,875,100
Manila	Manila	\$31,700	\$23,800	\$55,500
Manti	Manti - Ephraim	\$68,000	\$51,000	\$119,000
Milford	Milford Municipal	\$192,700	\$144,500	\$337,200
Monticello	Monticello	\$277,200	\$207,900	\$485,100
Monument Valley	Monument Valley	\$120,000	\$90,000	\$210,000
Morgan	Morgan County	\$365,600	\$274,200	\$639,800
Mount Pleasant	Mount Pleasant	\$31,700	\$23,800	\$55,500
Nephi	Nephi Municipal	\$233,000	\$174,700	\$407,700
Ogden	Ogden - Hinckley	\$2,415,600	\$1,811,500	\$4,227,100
Panguitch	Panguitch Municipal	\$68,000	\$51,000	\$119,000
Parowan	Parowan	\$317,500	\$238,100	\$555,600
Price	Carbon County	\$759,700	\$569,700	\$1,329,400
Provo	Provo Municipal	\$4,967,200	\$3,725,100	\$8,692,300
Richfield	Richfield Municipal	\$405,900	\$304,400	\$710,300
Roosevelt	Roosevelt Municipal	\$217,800	\$163,300	\$381,100
Salina	Salina - Gunnison	\$64,000	\$48,000	\$112,000
Salt Lake City	Salt Lake City Municipal II	\$9,892,100	\$7,418,400	\$17,310,500
Spanish Fork	Spanish Fork - Springville	\$579,500	\$434,600	\$1,014,100
Tooele	Bolinder Field - Tooele Valley	\$638,900	\$479,100	\$1,118,000
Wendover	Wendover	\$619,700	\$464,700	\$1,084,400
General Aviation Airports Total		\$33,742,700	\$25,304,500	\$59,047,200
Total		\$45,060,400	\$33,792,000	\$78,852,400



APPENDIX

Table A-16
Commercial Service Visitor Output
2003

ASSOCIATED CITY	AIRPORT NAME	DIRECT COMMERCIAL SERVICE VISITOR OUTPUT	SECONDARY COMMERCIAL SERVICE VISITOR OUTPUT	TOTAL COMMERCIAL SERVICE VISITOR OUTPUT
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	\$112,550	\$84,450	\$197,000
Cedar City	Cedar City Regional	\$2,772,000	\$2,078,800	\$4,850,800
Moab	Canyonlands Field	\$453,600	\$340,200	\$793,800
St. George	Saint George Municipal	\$12,398,400	\$9,298,000	\$21,696,400
Salt Lake City	Salt Lake City International	\$1,524,247,200	\$1,143,085,800	\$2,667,333,000
Vernal	Vernal - Uintah County	\$655,200	\$491,400	\$1,146,600
Commercial Service Airports Total		\$1,540,638,950	\$1,155,378,650	\$2,696,017,600



UTAH AIRPORTS ECONOMIC IMPACT STUDY

Table A-17
Total Aviation-Related Output
2003

ASSOCIATED CITY	AIRPORT NAME	TOTAL DIRECT OUTPUT	TOTAL SECONDARY OUTPUT	TOTAL COMBINED OUTPUT
Commercial Service Airports				
Bryce Canyon	Bryce Canyon	\$1,221,400	\$911,600	\$2,133,000
Cedar City	Cedar City Regional	\$13,176,500	\$9,672,100	\$22,848,600
Moab	Canyonlands Field	\$3,437,100	\$2,501,500	\$5,938,600
St. George	Saint George Municipal	\$16,291,200	\$12,093,500	\$28,384,700
Salt Lake City	Salt Lake City International	\$3,092,658,700	\$2,252,103,700	\$5,344,762,400
Vernal	Vernal - Uintah County	\$3,228,800	\$2,347,400	\$5,576,200
Commercial Service Airports Total		\$3,130,013,700	\$2,279,629,800	\$5,409,643,500
General Aviation Airports				
Beaver	Beaver Municipal	\$116,700	\$87,500	\$204,200
Blanding	Blanding Municipal	\$7,440,300	\$5,080,800	\$12,521,100
Bluff	Bluff	\$90,200	\$68,000	\$158,200
Bountiful	Bountiful Skypark	\$9,051,600	\$6,368,000	\$15,419,600
Brigham City	Brigham Municipal	\$5,121,000	\$3,768,000	\$8,889,000
Delta	Delta Municipal	\$439,200	\$330,700	\$769,900
Duchesne	Duchesne Municipal	\$274,500	\$207,100	\$481,600
Dutch John	Dutch John	\$66,500	\$50,100	\$116,600
Escalante	Escalante Municipal	\$174,900	\$131,800	\$306,700
Fillmore	Fillmore	\$135,600	\$101,800	\$237,400
Glen Canyon	Bullfrog Basin	\$454,200	\$340,600	\$794,800
Green River	Green River Municipal	\$675,200	\$508,200	\$1,183,400
Halls Crossing	Cal Black Memorial	\$463,200	\$349,000	\$812,200
Hanksville	Hanksville	\$114,300	\$86,100	\$200,400
Heber City	Heber City Municipal	\$4,808,600	\$3,428,700	\$8,237,300
Huntington	Huntington Municipal	\$1,150,900	\$800,700	\$1,951,600
Hurricane	Hurricane	\$1,594,600	\$1,142,300	\$2,736,900
Junction	Junction	\$61,500	\$46,300	\$107,800
Kanab	Kanab Municipal	\$3,790,500	\$2,832,700	\$6,623,200
Loa	Wayne Wonderland	\$240,500	\$181,200	\$421,700
Logan	Logan - Cache	\$9,393,800	\$6,707,000	\$16,100,800
Manila	Manila	\$86,000	\$64,900	\$150,900
Manti	Manti - Ephraim	\$602,700	\$455,000	\$1,057,700
Milford	Milford Municipal	\$339,600	\$255,500	\$595,100
Monticello	Monticello	\$397,600	\$298,900	\$696,500
Monument Valley	Monument Valley	\$143,000	\$107,400	\$250,400
Morgan	Morgan County	\$1,090,500	\$786,900	\$1,877,400
Mount Pleasant	Mount Pleasant	\$176,600	\$133,300	\$309,900
Nephi	Nephi Municipal	\$1,670,700	\$1,248,800	\$2,919,500
Ogden	Ogden - Hinckley	\$34,044,800	\$25,282,400	\$59,327,200
Panguitch	Panguitch Municipal	\$241,500	\$182,100	\$423,600
Parowan	Parowan	\$2,128,700	\$1,492,000	\$3,620,700
Price	Carbon County	\$2,287,200	\$1,688,900	\$3,976,100
Provo	Provo Municipal	\$16,684,500	\$11,811,900	\$28,496,400
Richfield	Richfield Municipal	\$2,045,400	\$1,456,000	\$3,501,400
Roosevelt	Roosevelt Municipal	\$579,800	\$423,800	\$1,003,600
Salina	Salina - Gunnison	\$94,600	\$71,100	\$165,700
Salt Lake City	Salt Lake City Municipal II	\$31,118,100	\$23,257,800	\$54,375,900
Spanish Fork	Spanish Fork - Springville	\$14,849,300	\$10,308,100	\$25,157,400
Tooele	Bolinder Field - Tooele Valley	\$2,749,400	\$2,058,500	\$4,807,900
Wendover	Wendover	\$1,879,700	\$1,413,400	\$3,293,100
General Aviation Airports Total		\$158,867,500	\$115,413,300	\$274,280,800
Total		\$3,288,881,200	\$2,395,043,100	\$5,683,924,300

